SAIC

An Employee-Owned Company

PAS APPOINTMENT STANDARDIZATION Phase II:
IMPLEMENTATION UPDATE GUIDE

S/W Version 4.603

D/SIDDOMS II

CHCS II
COMPOSITE HEALTH CARE SYSTEM

**Delivery Order #091, FY00 CHCS Appointment Processing Standardization (APS)
Deliverable Item 08**

**Submitted in Response to:
D/SIDDOMS II Contract DASW01-98-D-0032**

For:

**Defense Supply Service - Washington
and Clinical Information Technology Program Office (CITPO)
RoDonda Thompson D/SIDDOMS IT Acquisition and Contracts Manager
CDR Julia Clark, CITPO/CHCS Program Office Task Manager**

By:

**Science Applications International Corporation
Enterprise & Health Solutions Sector
10260 Campus Point Drive, San Diego, CA 92121
James Kosman, Program Manager, Phone: (703) 824-5970
Chris Rhodes, Product Manager, Phone: (858) 826-3889**

This page has been
left blank
intentionally.

TABLE OF CONTENTS

LIST OF APPENDIXES

How To Use This Document

The Implementation Update Guide (IUG) is a reference manual for the implementation of Appointment Standardization, Phase II, CHCS Version 4.603. There is an IUG for each functionality. This IUG is applicable to the Patient Appointment and Scheduling (PAS) subsystem.

The Table of Contents provides an outline of the information contained in this guide. The document is divided into the following sections:

HOW TO USE THIS DOCUMENT - A description of the document and how to use it.

1.   SUMMARY OUTLINE - Brief overview of changes-this can be used as a handout to all users.

2.   SUBSYSTEM CHECKLIST - This is a step-by-step list of pre and post install implementation activities.

3.   CHANGES AND ENHANCEMENTS - a description of each change with subsections including an Overview, Detail of Change, and File and Table Change.

4.   APPENDIXES - applicable information pertaining to the implementation of Version 4.6 including Common Files changes, and a Master Checklist for all Subsystems.

This page has been
left blank
intentionally.

1. SUMMARY OUTLINE

This section is intended to serve as a brief overview of the software changes associated with APS II only. Section 3 of this document contains the details of the conversions and business rules for each of the Summary overviews listed in this section. Related DOD, TMA policy changes and guidelines may be found in the Commander's Guide to Access Success on the TRICARE Access Imperatives web page at http://www.tricare.osd.mil/tai.

1.1 PAS PROFILES AND FILE/TABLE

Several enhancements have been made to the Patient Appointment and Scheduling (PAS) Profiles and the PAS File and Table modules as part of the Appointment Standardization Project Phase II. Existing options affected are APRO – Appointment Type Profile Enter/Edit-list profiles, CPRO – Clinic Profile Edit-list profiles, and LPRO-List Profiles menu. A new option DFIL – Appointment Detail Code Enter/Edit has been created.

In the Appointment Type Profile users/supervisors may indicate that a specified non-standard appointment type may be used by all medical clinics in the MTFs to create templates and schedules and for appointment searches.

A user will be able to add, modify and/or inactivate non-standard appointment detail codes in the Appointment Detail Codes file via the option DFIL. Standard Detail Codes are listed in Appendix E. Detail codes may be linked to the clinic. New site-specific age codes and other TMA approved codes may be added when approved by the Lead Agent and/or TMA.

In addition to the new Appt Detail Code field in the Clinic Profile, users will be able to set the new Self-Referral Booking Allowed flag (via CPRO) to determine if the specified specialty care clinic allows users to book specialty care appointments in that clinic for patients without entering a PCM referral. If the Self-Referral Booking Allowed flag is set to "YES", then the clinic specialty field in the Clinic Profile must be populated with at least one specialty. That specialty will then be used by the system to determine which available provider schedule slots will be displayed to the user in Self-Referral Booking. **Note: Providers must have a related specialty populated in the Provider File.**

As part of the Installation, the system will set the new Medical Appt Type flag in the Appointment Type file to "YES" for the 18 **standardized appointment types plus EROOM, N-MTF, APV AND T-CON*.**

1.2 TEMPLATES BUILD

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Patient Appointment and Scheduling (PAS) Templates module has been modified to allow an authorized CHCS user the capability to:

- Select up to three (3) appointment detail codes for any slot being added/deleted or edited in a daily template for a provider in a medical clinic. The Scheduling Supervisor must have the new security key, SD APPT STAND to perform those actions.

- Modify the appointment type duration when creating/editing a daily template for a provider in a medical clinic.

- Change the workload from Count to Non-Count providing the user holds the security key, SD WK LOAD.

CHCS will also permit the definition of count or non-count workload for each slot created or modified in the Schedule and Template Build options. If the workload type indicator for the clinic is non-count, then all of the clinic's slots will automatically be set to non-count in the schedule/template and may not be changed. If the Workload Type for the appointment type used in that clinic is Count in the clinic profile (CPRO), then the Workload Type for that slot will default to Count in that template or scheduled being built.

Appointment detail codes must be in the Appointment Detail Codes file before they may be linked to template slots. CHCS contains 198 Standard Appointment Detail Codes that may not be edited, but users may add new site-definable, TMA/Lead Agent approved, non-standard Detail codes to this file. Please refer to the Commander's Guide for allowable non-standard codes that may be added.

Users may modify the appointment type duration when creating/editing a daily template for a provider in a medical clinic. When creating or editing a daily template, CHCS defaults the duration of the appointment type selected from the specified provider's profile but will allow the authorized user to modify the duration.

Only those Appointment Types that have the Medical Appt Type flag set to YES in the Appointment Type file may be added to a daily template.

1.3   SCHEDULES

Enhancements have been made to the Patient Appointment and Scheduling (PAS) module that give additional capabilities to CHCS users who create and maintain schedules. These enhancements include the new appointment detail codes that may be added to provider schedules to further define the appointment type linked to the schedule slot. Additionally, appointment type, duration and workload type may be modified at the individual schedule slot level when creating/editing a schedule if templates are not used. Scheduling supervisors performing these actions must have the appropriate new security keys (please refer to sections 2.5 and 3 for security keys details).

When adding to or editing a schedule for a provider in a medical clinic, the CHCS user now has the capability of selecting up to three appointment detail codes for any appointment slot. The appointment detail codes must be in the Appointment Detail Codes file before they can be linked to schedule slots. When entering or editing detail codes in a schedule, appointment detail codes

may be selected from the clinic pick list or the complete master list. Detail codes may also be deleted, if necessary.

The appointment type duration and workload type for a schedule slot may be modified when no template is used to create a schedule or when a schedule is being edited.

In addition, if you select multiple daily schedule slots to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comment), the system allows the user to enter the schedule slot data once for all the schedule slots selected. When the schedule is filed, CHCS will apply the updates to all the schedule slots selected.

1.4   APPOINTMENT BOOKING

The Managed Care Program (MCP) Health Care Finder's (HMCP) module has been modified to provide several new capabilities to CHCS users with the new appropriate security keys as part of Appointment Standardization, Phase II. They are:

- Allowed to search only for appointment types if the Medical Appointment Type flag is set to "YES".

- Search for available appointments by Standard Appointment Type, Duration, and/or Detail Code(s).

- View up to three appointment detail codes linked to any schedule slot being displayed on the available appointment display list.

- Select an appointment detail code from the clinic pick list and/or from the complete appointment detail code pick list to link to an appointment being booked.

- Delete an appointment detail code linked to an appointment being booked.

- Change the appointment type for an appointment at the time of booking.

- Enter an Appointment Type/Detail Code Change Reason.

- Change workload type.

- Provide a Self-Referral Appointing option. This option will permit appointing to specialty care without entry of a PCM referral.

The new security keys are SD APPT STAND and SD WK LOAD. Please refer to section 2.5 for the functions of the new security keys and sections 3.1 through 3.6 for details on their actions.

1.5   OPERATIONAL FORCES (OPS FORCES) BOOKING

The Health Care Finder PCM booking module has been modified to provide the capability to book a PCM appointment for an Active Duty patient whose enrolling DMIS ID is defined as Operational Forces. The patient may be booked to any provider in any place of care in any MCP Provider Group to which the patient's assigned PCM is a member.

A new field, "OPS Forces PLOC", has been added to the MCP Place Of Care Profile in the Place of Care Enter/Edit option on the Provider Network File/Table Maintenance Menu in MCP. The "OPS Forces Booking PLOC" must be set to 'YES' for the place of care associated with the enrollment.

1.6   OUTPUT REPORTS/FORMS

The PAS/MCP Output Reports/Forms option has been modified to include as output the appointment detail codes and the type Duration linked to either a schedule slot or an appointment. In addition, this modification will impact print templates, print schedules, print clinic/provider roster, print outpatient encounter forms, display patient appointments, list profiles, and the Non-MTF Log Report.

Two new reports have been developed. These are the Self-Referral Booking Report and the Appointment Detail Code Workload Report.

With the release of Appointment Standardization Phase II, the PAS workload and the WAM workload generation processes will be modified to accommodate the structural data changes inherent in the above-mentioned change to the Count/Non-Count designation of appointments.

1.7   CONVERSIONS AND REQUIREMENTS

The APS II conversions affect all daily templates, all providers' schedules, all patient appointments and the Medical Appt Type flag in the Appointment Type file.

Conversions will convert templates, schedules, and appointments based on the business rules as listed in Section 3. (Please refer to all of the Business Rules listings in Sections 3.1 through 3.6).

2. SUBSYSTEM CHECKLIST

2.1 USER TRAINING

_____ Scheduling supervisors should receive 1-2 hours of classroom training. The course content should center on the use of detail codes and standard appointment types in Templates and Schedules, Ops Forces booking, Self Referral Booking and the use of Detail Codes in booking. (Refer to Sections 3.1, 3.2,3.3 and 3.5 of this IUG).

_____ Booking clerks should receive 1 hour of classroom training. Emphasis should be given to use of detail codes and the appointment search features of Appointment Standardization. Time should also be spent on the new self-referral and Ops Forces features. (Refer to Sections 3.4 and 3.5 of this IUG).

_____ Personnel involved with reports should receive .5 hour of classroom/demonstration training in connection with changes in existing reports and training on the two new reports that will be generated by the APS II Project. (Refer to Section 3.6 of this IUG).

2.2 IMPLEMENTATION ISSUES

2.2.1 Pre-Load

____ **Scheduling Supervisors should read the Business Rules in section 3.1.2.5 and ensure that templates and schedules have been prepared in accordance with that section prior to the APS II software load.**

_____ Sites should have performed MCP file and table builds and transitioned to the Managed Care booking process prior to the installation of this enhancement.

_____ Users should be sufficiently trained for the transition to the HCF option and the use of standard appointment types and detail codes.

_____ Prior to the APS II load, templates and schedules should be printed out for the purpose of comparing them post-load.

_____ It's recommended that Templates and Schedules already built should be using the Standardized Appointment Types as much as possible.

_____ Scheduled appointments linked to a schedule slot to be converted will be populated with the Appointment Detail codes in the comment slot.

_____ Supervisors should verify that the template appointment slot comments prior to the load are the format defined in Section 3.1.2.5B of this IUG or they will not be converted. Free text

will not be converted. Detail codes placed in the comment field for conversion must be exact matches of Detail codes in the CHCS Appointment Detail code.

2.2.2 Post-Load

____ File and Table personnel may start adding site definable age appointment detail codes to Clinic Profiles shortly after installation. Detail Codes are not mandatory in the clinic profiles but will make a booking clerk and Template creator's work easier.

____ Supervisors should compare post-load templates with pre-load templates.

____ Reports personnel should be reminded of the two new reports to be generated by the APS II Project and that extensive reports should be run during non-prime time. (Note: appointment detail codes will only appear as output on the appropriate reports if they were linked to templates/schedules or appointments at the time templates/schedules were created/edited or when an appointment was booked).

____ Clinics that permit Self Referral should ensure that the clinic profile "Clinic Specialty" and "Self Referral Allowed" fields are populated.

____ Booking clerks, Supervisors and DBA's should be aware that if appointments are not found during use of (Self)-Referral booking, that they should verify the provider's specialty, Clinic Specialty, and the MCP Provider Specialty Type in addition to other normal trouble shooting efforts.

____ All schedules and templates will be converted whether or not Standard Appointment Types are used. If non-standard Appointment Types are kept in schedules, they will not be useable except for those appointments already booked.

____ After the installation set the Medical Appt Type flag to "YES" for those non-standard appointment types the site wishes to continue using.

____ Supervisors should be aware that if non-standard Appointments Types which are Booked are KEPT, they must be changed to Standard Appointment Types via EOD processing. If not done, EOD processing will not be completed and monthly workload reports will not be completed.

2.3 INTEGRATION ISSUES

____ If there is any conflict between the software and the Commander's Guide to Access Success, TRICARE policy will supercede. Please refer to the Commander's Guide in all matters of policy. The Commander's Guide to Access Success on the TRICARE Access may be found in the imperatives web page at http://www.tricare.osd.mil/tai.

_____ All MTF clinics including Dental which may see Prime patients without Referrals should ensure that the Self-Referral flag is set to Yes in the Clinic Profile (CPRO).

_____ The Access to Care categories currently in CHCS may display a greater number of days' schedules then the current Tricare standards. In the event of any conflict, booking clerks should be made aware that Tricare Standards are the final authority and they should following those booking guidelines.

_____ Making an Appointment a Non-Count instead of Count may now be done while making the appointment by modifying the schedule or template. End-of-Day processing may still be used but no longer has to be used. The user will need the new security key **SD WK LOAD** to perform this function.

_____ The Clinic Specialty in the option CPRO is cross-referenced to the MCP Specialty Type file. Appointments booked via the new option, (S)elf-Referral, will locate only those providers with specialties linked to the Clinic Specialty via the MCP Specialty type file. Any changes or additions to the Clinic Specialty field may impact Consult tracking and booking.

_____ The PAS workload and the WAM workload generation processes will be modified to accommodate the structural data changes inherent in the above-mentioned change to the Count/Non-Count designation of appointments. (Refer to section 3.6.2.3).

_____ The Clinic Specialty field is used for Consult Tracking Booking via MCP. Please consult with the clinical POC and/or DBA prior to making changes to this field.

_____ Only those appointment types that have the Medical Appt Type flag set to 'YES' in the Appointment Type file may be added to a schedule. If a user elects to create a schedule using a daily or weekly schedule that contains one or more nonstandard appointment types that do not have the Medical Appt type flag in the Appt Type Profile set to "YES", the system will display the following message to the user and prevent the user from creating a new schedule using that template as is: "This template may not be used to create schedules until the following appointment type/s is changed or the Medical Appt Type flag in the Appointment Type Profile is set to YES:

[Appointment Type]   [Appointment Type]"

_____ Appointment slots that contain Slot Comments will have a tilde (~) to the left of the appointment slot. If a user wishes to view the Slot Comment, the cursor should be positioned to the left of the appointment slot and the F9 function key used to view the details of the appointment slot including the Slot Comment. (Refer to Section 3.4.2.2 P for details).

2.4   FILE AND TABLE CHANGES

_____   The Database Administrator (DBA) should assign the new **SD APPT STAND** security key to PAS scheduling supervisors, creators of Templates/Schedules and booking clerks permitted to change Appointment Type/Duration, and with the ability to modify appointment slot Detail codes.

_____   The DBA should assign the new security key, **SD WK LOAD,** to PAS personnel permitted to modify the Workload Type.

_____   Supervisors should be aware that if slot comments are not formatted and defined in Templates and Schedules as specified in section 3.1.2.5 B, Business rules for conversion, the comments will not convert. Schedule builders will then have to edit the templates and schedules to read the Detail codes.

_____   Scheduling supervisors should note that conversions will:

- Set the Medical Appt Type flag to 'YES' in the Appointment Type file for the standardized appointment types. Nonstandard appointment types will be ignored by the conversion and will have this value set to null. In order to use them post-conversion, they will have to manually be changed post-install.

- Convert all provider templates linked to a clinic with a location type of C (Clinic) or S (Same Day Surgery). The conversion will populate the new Duration, Workload Type, and Detail Codes fields for each schedule slot in a Daily Template.

- Convert all provider schedules linked to a clinic with a location type of C (Clinic) or S (Same Day Surgery) and created for the previous month, the current month and all future dates. The conversion will populate the new Duration, Workload Type, and Detail Codes field for each schedule slot in a provider schedule.

- Convert all scheduled and unscheduled Patient Appointment records with an appointment date from the 1st of the previous month, for the current month or a future date. This conversion will populate the new workload type field and detail codes field, if appropriate, in each Patient Appointment record. Unscheduled Visits will not have any detail codes linked to the patient appointment record after the conversion.

- Add two new fields, "Medical Appt Type" and "Uneditable:" to the Appointment Type Profile option (APRO).   The standardized Appt Types will be set to YES.

- Convert all the entries in the PAS Templates file so that the new Duration, Workload Type and Appointment Detail Code fields linked to each schedule slot in a daily and weekly template are populated appropriately. (Refer to 3.3.2.4.) Appointment Detail Codes will be populated from the slot comment field for each scheduled slot.

- Convert the appropriate entries in the Schedulable Entity file so that the new Duration, Workload Type and Appointment Detail Code fields linked to each schedule slot in a schedule are populated appropriately. (Refer to 3.1.25). Appointment Detail Codes will be populated from the slot comment field for each scheduled slot.

- Convert the appropriate entries in the Patient Appointment file so that the new Workload Type and Appointment Detail Code fields linked to each scheduled appointment record are populated appropriately. (Refer to 3.1.25).

____ Scheduling supervisors should note that a new file for Detail Codes has been added (DFIL) and is contained in the PAS Scheduling Supervisor's menu under FILE->DFIL.

____ The Scheduling Supervisor should ensure that templates all contain the Standard Appointment Types.   However, all templates and schedules, whether they contain standard and non-standard appointment types or not, will be converted, including detail codes linked to each schedule slot being converted.

____ Scheduling supervisors should note that individual Appointment Schedule Slots may be changed from Count to Non-Count by editing the Templates or Schedules and/or during the Booking process.

_____ Clinic supervisors should ensure that the new Clinic Profile field "Self-Referral Allowed" flag is set to "YES" if the clinic is one that allows self-referrals such as optometry, mental health, etc. If the clinic requires consults or referrals, then the field should be left null or set to "NO".

_____ Clinic supervisors should note that the Clinic Specialty field in the Clinic Profile (CPRO) has been relocated after the Clinic Profile parameters and will be a required field if the clinic "Self-Referral" flag is set to YES.

_____ Clinic supervisors having Clinic/Groups with Operational Forces enrolled patients should set the "Ops Forces PLOC" field to "YES" in order to permit booking to any provider in the MCP Group in which the patient's PCM is a member. The field can only be accessed via the Managed Care File and Table option PLAC.

____ **DBA's, Supervisors and credentialing personnel should ensure:**

that all self-referral clinics have the Clinic Specialty field populated prior to usage, that the MCP Specialty file is properly populated, and that providers who will have appointments booked via Self-Referral booking have a valid specialty populated in the MCP Specialty Type file.

2.5   SECURITY KEYS

Two (2) security keys have been added in the APS II project. The keys and their functions are:

SD APPT STAND   PAS Scheduling Supervisors tasked to create and maintain medical clinic profiles, templates and schedules must have the new **SD APPT STAND** security key.

Key Functions:

- Permits a user to enter/edit Detail Codes linked to a specified clinic in the PAS module on CHCS while creating/modifying templates and schedules, or booking. Note: Detail codes cannot be changed in option USV (Unscheduled Visits). Detail codes can be changed in option EOD (End of Day) or when booking the appointment to reflect the actual care scheduled and rendered.

- Permits a user to enter/edit new Appointment Types to the Appointment Type file using the Appointment Type Enter/Edit option and change the Appointment Type while booking.

- Permits a user to enter/edit Duration of appointments.

SD WK LOAD   Key Function:

- Permits a supervisor to modify the Workload Type for Count/Non-Count appointment slots while editing or adding slots to a Template or schedule.

- Permits a Booking clerk assigned this key to change the Workload Type for Appointments slots while booking or during End of Day processing.

3.   **CHANGES AND ENHANCEMENTS**

This section takes you step by step through the new features you will use in scheduling and booking patient appointments. Each section will give you an overview of the changes, the functional dependencies of the changes, a systematic walk through by way of actual screen captures, and the business rules that apply to the changes and enhancements. If there are any file and table changes or implementation issues, you will find them at the end of each subsection. The CHCS users mostly impacted by the APS II Project are scheduling supervisors and booking clerks. These users should thoroughly study this section. Please refer to the Commander's Guide to Access Success on the TRICARE Access Imperatives web page at http://www.tricare.osd.mil/tai for policy issues on Standard Appointment Types and Detail Codes.

3.1   PAS PROFILES AND FILE/TABLE BUILD

3.1.1   Overview of Change

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Patient Appointment and Scheduling (PAS) Profiles and the PAS File and Table modules will be modified to allow you the capability to:

- Indicate that a specified appointment in the Appointment Type file is a medical appointment type that may be used by all medical clinics in the MTF. A medical clinic here is defined as a Hospital Location (from the Hospital Location file) whose Location Type field contains a "C" for Clinic or "S" for Same Day Surgery.

- Add non-standard appointment detail codes to the Appointment Detail Codes file as allowed by TMA policy.

- Modify non-standard appointment detail codes in the Appointment Detail Codes file.

- Inactivate any non-standard appointment detail codes in the Appointment Detail Codes file.

- Link appointment detail codes to the clinic in a medical clinic profile.

- Delete any appointment detail codes linked to the clinic in a medical clinic profile.

- Enter self-referral allowed indicator for a specified medical clinic.

3.1.2   Detail of Change

In this section the Scheduling Supervisor will see the APS II changes to existing profiles: Appointment Type Profiles, Clinic Profiles, and the addition of a new Appointment Detail Code Enter/Edit option. This Detail of Change section includes: 1) general details, 2) functional dependencies, 3) the workflow of utilizing the changes, and 4) the business rules that control the changes.

3.1.2.1   General Details

A.   **New Appointment Detail Codes**

New Appointment Detail Codes will be added to the Appointment Detail Codes file (file # 44.7) as standard beneficiary priority appointment detail codes. Please refer to Appendix E for a complete list of Detail Codes contained in CHCS. Detail codes combine several different code categories, e.g., procedures, patient access types, gender, screening, education, and other types.

In addition to the Appointment Detail Codes the sites will be able to define their own 'age restriction' appointment detail codes and add other TMS approved but not yet released detail codes. New detail codes should be coordinated at the regional level (subject to the approval of your Lead Agent and Clinic Medical Director) to standardize detail codes across a region and prevent duplicate detail codes within the region.

B.   **Appointment Types**

The system requires that the following appointment types be maintained as standard appointment types in the Appointment Type file in addition to the 18 Standard Appointment Types introduced with Appointment Standardization Phase I. Please refer to Appendix F for a complete list of Standard Appointment Types.

T-CON*   Telephone Consult Non-searchable Appointment Type.

This non-searchable appointment type must be added to an individual provider's Provider Profile and the provider must be a User in the User file before telephone consults may be entered for the specified provider.

N-MTF   Non-MTF Appointment Type.

This appointment type must be added to the Non-MTF Place of Care (Clinic) profile and to the individual provider profiles for each provider linked to that non-MTF place of care. When a HCF logs a non-MTF appointment, the system will automatically populate the appointment type field with the N-MTF appointment type.

APV   Ambulatory Patient Visit.

This appointment type is used for outpatient same day surgery visits in all clinics with a location type of 'S' for same day surgery.

EROOM   This appointment type is used by CHCS in the Emergency Room software.

C.   **Functional Dependencies**

1. Sites will need to perform MCP file & table builds enumerated in Section 3.1.1 in order to utilize MCP.

2. As part of the Installation, the system will run the conversion to set the new Standard Appt Type flag in the Appointment Type file to YES for the 18 standardized appointment types. These are the nine standard appointment types plus one version of each with the "$" extender, e.g. PCM/PCM$. ROUT/ROUT$, etc.

3. PAS Scheduling Supervisors tasked to create and maintain medical clinic profiles, must have the new **SD APPT STAND security key**. This security key will allow the Scheduling Supervisor to enter/edit Detail Codes linked to a specified clinic in the PAS module on CHCS.

4. The new Appointment Detail Codes file must be populated with the site defined age detail codes before those codes may be utilized in MCP in addition to the standard Detail Codes post-conversion.

5. In order to access the Self-Referral Booking in MCP, the specified clinic must have the new "Self-Referrals Allowed" flag set to YES in the Clinic Profile for the specified clinic.

6. No change will be made to the Access to Care (ATC) functionality. The appointment booking clerks will still be required to enter an ATC category prior to searching for available appointment slots.

7. If you enter site definable security keys in the Booking Authority, Appt Change Authority and/or Overbook Authority fields for one or more standard appointment types in either the Clinic or Provider Profiles, you must assign those same site definable security keys to the appropriate booking clerks so they may split and join slots, change appointment type, add, delete or modify detail codes, and enter appointment change reason in addition to the SD APPT STAND and/or the SD WK LOAD.

3.1.2.2 Appointment Type Profile Enter/Edit

The Appointment Type Profile needs to be edited because the system requires that appointment types be specified as medical appointment types that may be used by all medical clinics in the MTF. CHCS will allow you to view the standard Appointment Type data but not modify it. See screen 3.1.1 below. Note the two (2) new fields at the bottom of the screen. Additionally, all fields have been centered on the screen rather then being on the left side of the screen.

A new 'Medical Appt Type' field is being added to the Appointment Type Profile for this software release (refer to screen 3.1-1 below). A conversion will be run during the software installation process to automatically set this new field to 'YES' for each standard appointment type, as defined in Phase 1(e.g., PCM, PCM$).

An authorized user with the SD APPT STAND security key may add new non-Standard Appointment types to the Appointment Type file using the Appointment Type Enter/Edit option (APRO). When you enter a new appointment type, the system displays the 'Are you adding [Appt Type] as a new APPOINTMENT TYPE? Y//'.

If you accept the default, the system displays the SD APPT TYPE screen (refer to Screen 3.1-1) and allows you to enter and file the appropriate appointment type data.

Only those appointment types that have the Medical Appt Type flag set to 'YES' in the Appointment Type file may be added to a schedule. If a user elects to create a schedule using a daily or weekly schedule that contains one or more nonstandard appointment types that do not have the Medical Appt type flag in the Appt Type Profile set to "YES", the system will display the following message to the user and prevent the user from creating a new schedule using that template as is: "This template may not be used to create schedules until the following appointment type/s is changed or the Medical Appt Type flag in the Appointment Type Profile is set to YES:

[Appointment Type]   [Appointment Type]"

To complete the Appointment Type Profile, use the following menu path.

A.   MENU PATH: PAS=>S=>PROF=>APRO

B.   Process

1. As soon as you [e.g., Scheduling Supervisor] select the Appointment Type Profile Enter/Edit (APRO) option from the Profiles menu in PAS, the system displays the Select APPOINTMENT TYPE prompt.

2. When you enter an appointment type (e.g., PCM, ROUT), the system displays the SD APPT TYPE screen (refer to Screen 3.1-1). New fields are bolded.

===================================**Screen 3.1-1**===================================

Appointment Type: WELL   SD APPT TYPE

                     Name: WELL [Display Only]
              Description: WELLNESS/HEALTH APPT [Display Only]
   Are Appt Slots Searchable?:   YES
                    Status: ACTIVE
                  Category: INITIAL
             Uneditable: YES [Display Only]   ← ------------(New Field)
        Medical Appt Type: YES   ← --------------(New Field)

Press RETURN to continue

================================ **End of Screen** ================================

3. DENTAL. This change allows Dental Clinics with a Location Type of "D" and those using the DDSA software for appointment booking to use any standard on non-standard Appointment Type. All other medical, surgical and any Dental clinic with a Location type of "C" (Clinic) or "S" (Same Day Surgery) using the PAS software for appointment booking must have the Medical Appt Type field set to 'YES'.

4. Pre-existing non-standard Appointment Types may be seen but may not be used to create schedules and templates unless the "Medical Appt Type" flag is set to "YES".

3.1.2.3   DFIL Appointment Detail Codes Enter

The new Appointment Detail Codes file must be populated with the site defined age detail codes in addition to the standard Detail Codes before those codes may be utilized in MCP after the APS2 software is installed.

To enter/edit the new Appointment Detail Codes utilizing the new option DFIL, use the following menu path.

A.   MENU PATH: PAS=>S=>FILE=>DFIL

1. A new option, Appointment Detail Codes Enter/Edit (DFIL), will be added to the PAS File/Table Maintenance Menu in PAS Scheduling Supervisor (refer to Screen 3.1-2). The new option is bolded.

==================================**Screen 3.1-2**===================================

```
 AFIL    Activate/Inactivate Clinic Provider
 CFIL    Create A New Clinic
 EFIL    Enter/Edit MEPRS Codes/COST POOL Codes
 MFIL    Method of Transit Enter/Edit
 OFIL    Outpatient Disposition Enter/Edit
 PFIL    PAS Mailer Menu
 DFIL    Appointment Detail Codes Enter/Edit
 BFIL    Booking Service Type Enter/Edit
 SFIL    Schedule Modification Reason Enter/Edit
 TFIL    Trackable Entity Enter/Edit
 WFIL    Wait List Priority Enter/Edit
 XFIL    Activate/Inactivate Treatment Room
```

Select File/Table Maintenance Menu Option: DFIL   Appointment Detail Codes Enter/Edit

==============================   **End of Screen**   ==============================

2. As soon you select the Appointment Detail Codes Enter/Edit option (DFIL) from the PAS File/Table Enter/Edit option, the system will display the Select APPOINTMENT DETAIL CODE prompt.

3. If you enter a standard detail code, the system will automatically display the Appointment Detail Code screen for the appointment detail code entered. You will be allowed to view but not edit the data previously entered except to change the status to Inactive (refer to Screen 3.1-3). Standard appointment types are uneditable. New fields are bolded.

====================================**Screen 3.1-3**====================================

APPOINTMENT DETAIL CODE: BK

        Code: **BK**
   Description: **BACK PAIN OR PROBLEM**
    Uneditable: **YES (For standard Detail Codes)**
      Status: **ACTIVE**

Press RETURN to continue

============================= **End of Screen** ==============================

4. The system will allow you to enter new appointment detail codes (e.g., site definable 'age restriction' detail codes).

5. As soon as a new detail code is entered, the system will display the following:

   [Detail Code]

   Are you adding [Detail Code] as a new APPOINTMENT DETAIL CODE? Y//'.

   If you accept the default to add the new detail code, the system will display the Appointment Detail Code screen and allow you to enter and file a new site definable appointment detail code coordinated at the regional level (refer to Screen 3.1-3). Standardized Detail codes in the file may not be edited.

6. As soon as you file the data, the system will allow you to link that newly entered appointment detail code to a clinic pick list, a schedule slot or an appointment.

3.1.2.4   Clinic Profile Edit

To populate the two new fields (Self Referral Allowed and Clinic Detail Codes), use the following menu path.

A. MENU PATH: PAS=>S=>PROF=>CPRO

B. Details:

1. As soon as you elect to edit the Clinic Profile for a medical clinic, the system displays the Select CLINIC prompt.

2. Once you have entered the appropriate clinic name and pressed 'RETURN' to continue, the system displays the SD CLINIC PROFILE screen (refer to Screen 3.1-4) seen below.

First Screen:

```
=================================Screen 3.1-4=================================

HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO

              Name:  PRIMARY CARE CLINIC - NO
       Abbreviation:  PCCNO
           Facility:  NBMC NAVSTA SEWELLS
           Division:  NAVY OUTPATIENT DIVISION
      Building Name:
    Building Number:
     Street Address:
                ZIP:  23708
               City:  PORTSMOUTH
              State:  VIRGINIA
    Clinic Location:
 Clinic Availability:
          Telephone:
    Enrollee Lockout:  NO
        Type of Care:
            Service:  PRIMARY CARE DEPARTMENT
         Department:  PRIMARY CARE DEPARTMENT
         MEPRS Code:  BHAA
```

=============================== **End of Screen** ===============================

3. One new field, 'Self-Referrals Allowed' has been added to the Clinic Profile and is seen bolded on the screen below:

Second Screen:

```
=================================Screen 3.1-4=================================

HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO
          Wait List Activated: NO         Maximum Wait List Days:     day(s)
    Wait List Provider Mandatory:         Wait List Hold Duration:    day(s)
      Auto Wait List Processing:         Schedule Hold Duration:  2 day(s)
    Prompt for Requesting Service: NO       Patient Record Pull:  1 day(s)
              Clinic Type: COUNT         Radiology Record Pull:  2 day(s)
          Check Holiday File: YES            Roster Production:  1 day(s)
              Cost Pool Code:           Prepare Reminder Notice: 10 day(s)
          Activation Status:  ACTIVATED      Available Schedule: 30 day(s)
      Access to Care Reporting: YES
```
Self-Referrals Allowed: YES ←-------(New Field)
```
          Clinic Appt Instructions:
```

=============================== **End of Screen** ===============================

4. Self-Referrals Allowed:

    a. If you set the Self-Referrals Allowed: field to 'YES', then CHCS will allow a booking clerk to book specialty care appointments for patients without the need of a PCM referral in the specified clinic. It will also require you to populate the Clinic Specialty field (refer to Screen 3.1-5).

b. If you set the Self-Referrals Allowed flag to 'NO', you will not be allowed to book self-referrals in the clinic.

c. The Clinic Specialty screen (3.1-5) has been relocated to display after screen 3.1-4 rather than before it.

Note: This field determines which providers' schedules will be displayed to the user for appointment booking in Self-Referral Booking.

=================================**Screen 3.1-5**==================================

HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO
 Select CLINIC SPECIALTY:
    FAMILY PRACTICE/PRIMARY CARE

=============================== **End of Screen**   ================================

d. The Clinic Specialty field is required so that when a Self-Referral is entered via the Self-Referral Booking option, the system will automatically populate the specialty field without having to prompt the user. If multiple clinic specialties are entered, the system will then prompt the user for the appropriate clinic specialty to link to the self-referral (refer to the Self-Referral Booking option in this document, Section 3.4.2.2-F. Self-Referral Booking).

5.   Appointment Detail Code

Once you have entered the appropriate data in the Clinic Specialty field, the system will prompt you to enter the clinic Detail Codes pick list for the specified clinic. The following screen shows selections for detail codes. Finally in screen 3.1-7, the user has selected and entered a Detail Code.

The following are selections for detail codes:

=================================**Screen 3.1-6**==================================

Detail Codes:

Choose from:
  ADHD   Attention Deficit and Hyperactivity Disorder or Attention Deficit Disorder
  ANGER   Anger management education - no PCM referral required
  ASTHMA   Asthma evaluation or education appointments
  BCP   Birth Control
  BEPC   Birth and Early Parenting Class
  BF   Weight exceeding body fat standards
  BFC   Breast Feeding Class
* BK   Back pain or problem
  BTL   Bilateral Tubule Ligation
+ CHOL   Cholesterol

Make choice = SELECT?   Exit = F10?

=============================== **End of Screen**   ================================

==================================**Screen 3.1-7**==================================

HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO

    Detail Codes: [multiple]

       BK

BK   BACK PAIN OR PROBLEM   Are you adding 'BK   BACK PAIN OR PROBLEM' as a new
    CLINIC APPOINTMENT DETAIL CODE (the 1st for this HOSPITAL LOCATION) ? Y

============================== **End of Screen** ==============================

    a. You are not required to enter the most commonly used clinic appointment detail codes to be used either when creating templates, creating schedules, or booking appointments. If no appointment detail codes are entered in the specified clinic profile, the system will display a complete list of all appointment detail codes at the Appointment Detail Code field when creating templates/schedules and/or booking appointments.

    b. If you elect to enter a detail code for the specified clinic pick list, the system will display

       'Are you adding [detail code] as a new CLINIC APPOINTMENT DETAIL CODE (the 2ND for this HOSPITAL LOCATION)? Y//'.

    c. As soon as you accept the default to add the detail code to the pick list, the system adds the appointment detail code to the clinic pick list. You may also delete an entry from the clinic pick list by positioning the cursor next to the appointment detail code entry and pressing the DELETE key. The system will then prompt you to verify the deletion prior to deleting the entry from the clinic pick list.

==================================**Screen 3.1-8**==================================

HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO

 Select APPOINTMENT TYPE:
 ACUT
 PCM
 PCM$
 ROUT
 WELL

============================== **End of Screen** ==============================

Once you have entered/edited the Clinic Appointment Detail Code pick list, CHCS allows you to enter/edit the clinic appointment types. After the clinic profile data is filed, the clinic appointment detail codes pick list may be used when creating templates/schedules and/or booking appointments.

3.1.2.5 Business Rules

A. Self-Referral and F/T Rules

1. The standard appointment types and descriptions may be viewed but not modified via the APRO Appointment Type Enter/Edit option on the PAS Profiles menu in CHCS.

2. The standard detail codes and descriptions may be viewed but not modified via the DFIL Appointment Detail Codes Enter/Edit option on the PAS File and Table Maintenance menu in CHCS. New site definable age Detail Codes may be added to the file. Please refer to the Commander's Guide for new TMA approved Detail Codes that MTFs may add.

3. Standard Appointment Types and Detail Codes will be maintained via the CHCS Standard Table Update Process quarterly. However, initially the sites may request a monthly update as needed until the entries in the file are stabilized.

4. If the Self-Referrals Allowed field is set to 'YES' in a Clinic Profile, you will be required to populate the Clinic Specialty field in the Clinic profile as well. If multiple clinic specialties are entered for a clinic that allows self-referrals, the system will prompt you to select the appropriate clinic specialty when booking the self-referral. The clinic specialty is required so that a system-generated referral may be created in the MCP Referral file, and the appropriate provider's schedules will be displayed during Self-Referral booking.

5. The Medical Appt Type flag in the Appointment Type file must be set to 'YES' before the specified appointment type may be utilized in MCP.

6. Only those appointment types that have the Medical Appt Type flag set to 'YES' in the Appointment Type file may be added to a schedule. If a user elects to create a schedule using a daily or weekly schedule that contains one or more nonstandard appointment types that do not have the Medical Appt type flag in the Appt Type Profile set to "YES", the system will display the following message to the user and prevent the user from creating a new schedule using that template as is: "This template may not be used to create schedules until the following appointment type/s is changed or the Medical Appt Type flag in the Appointment Type Profile is set to YES:

   [Appointment Type]   [Appointment Type]"

B. Business Rules for conversions of Appointment Type, Templates, PAS Profiles, Schedulable Entity, and Patient Appointments files.

The following apply to the conversion that will be run for Appointment Standardization, Phase II:

1. All Daily and Weekly Templates regardless of the Medical Appt Type flag being set to YES in the Appointment Type file will be converted.

2. All Provider Schedules for the previous month, the current month and all future provider schedules will be converted.

3. All patient appointment records for the previous month, the current month, and all future appointments will be converted.

4. Only schedule slots with a date/time no earlier than the 1st of the previous month prior to the conversion date (e.g., Conversion Date-15Aug2001; 1st Schedule Slot Date/Time eligible for conversion 01Jul 2001@0700) will be converted.

5. Only patient appointment records with an appointment date/time no earlier than the 1st of the previous month prior to the conversion date will be considered for the conversion (e.g., Conversion Date-15Sept2001; 1st Patient Appointment Date/Time eligible for conversion 01Aug 2001@0700).

6. The Workload Type field for each schedule slot being converted in a template and/or a provider schedule will be set to Non-Count if the Clinic, linked to the template or schedule, is a Non-Count Clinic (Clinic Type field in Clinic Profile = NON-COUNT).

7. If the Clinic linked to the template or schedule being converted is a Count Clinic (Clinic Type field in Clinic Profile = COUNT), the conversion will default the Workload Type field, for the schedule slot being converted, from the current Workload Type setting in the Clinic Profile for the Appointment Type linked to the schedule slot being converted.

8. The Templates and Schedules conversions will only evaluate a schedule Slot Comment field if the free text data string entered is equal to 2-8 characters.

9. The Templates and Schedules conversions will only evaluate up to 3 data strings in the Slot Comment field, each separated from the next by a semicolon (ADHD; BPGME; BPAD).

10. When evaluating the free text schedule Slot Comment, the Templates and Schedules conversions will search for the first data string equal to 2-8 characters. If the first data string is less than 2 characters or greater than 8 characters, each conversion will search the slot comment for a semicolon. If the first data string found in the free text Slot comment field is equal to 2-8 characters, each conversion will compare the first data string found to the Appointment Detail Codes entries in the Appointment Detail Code file.

11. If an exact match is found, each conversion will add the appropriate Appointment Detail Code as the first entry in new Appointment Detail Code field for the schedule slot being processed and delete the first data string from the Slot Comment field. The match is not case sensitive and up to three detail codes will be extracted.

12. If no exact match is found for the first data string identified in the Slot Comment, each conversion will ignore the first data string and search for the first semicolon entered in the free text Slot Comment field for the schedule slot being processed.

13. If no semicolon is found in the Slot Comment field for the schedule slot being processed, the conversion will look at the next schedule slot entry in the template or provider schedule being converted.

14. If a semicolon followed by a 2-8 character data string is found, each conversion will then compare the second data string to the Appointment Detail Codes in the Appointment Detail Code file.

15. If an exact match is found, each conversion will add the Appointment Detail Code as the second entry in new Appointment Detail Code field for the schedule slot being processed and delete the second data string from the Slot Comment field. If no exact match is found for the second data string identified in the Slot comment, each conversion will ignore the second data string.

16. Each conversion will then search the same free text Slot Comment field for a second semi-colon followed by a 2-8 character data string. If no data string is found, each conversion will look at the next schedule slot to be converted.

17. If a second semicolon followed by a 2-8 character data string is found, each conversion will then compare the third data string to the Appointment Detail Codes in the Appointment Detail Code file.

18. If an exact match is found, each conversion will add the Appointment Detail Code as the third entry in new Appointment Detail Code field for the schedule slot being processed and delete the third data string from the Slot Comment field. If no exact match is found for the third data string in the Slot Comment, each conversion will ignore the third data string and process the next schedule.

19. The Templates conversion will process all daily and weekly templates first.

20. When all daily templates have been converted, the Schedule conversion will then convert the applicable provider schedules applying the same business rules that were used to convert the daily and weekly template schedule slots.

21. When the conversion of the provider schedule slots has been completed, the Patient Appointment conversion will then convert the appropriate patient appointments.

22. The Patient Appointment conversion will use the Slot IEN and the Slot # fields in each patient appointment record to determine which Appointment Detail Codes and Workload Type linked to a provider schedule slot should be added to each patient appointment record.

23. If the patient appointment record being processed is a Walk-In or a Sick-Call, the Patient Appointment conversion will only populate the Workload Type field for that Unscheduled Visit. The Patient Appointment conversion will populate the Workload Type field with the Count or Non-Count setting linked to the Unscheduled Visit's appointment type in the appropriate Clinic Profile. Detail Codes for Unscheduled Visits may be added via End of Day Processing (EOD).

24. The new Duration field in the templates and schedules will be populated during the conversion of templates/schedules.

3.1.3   File and Table Change

A. Clinics may add the new site definable age code and other approved Appointment Detail Codes to the Detail Code file so they may be linked to Templates and Schedules. (MENU PATH: PAS=>S=>FILE=>DFIL).

B. If the Self-Referral Allowed field is set to YES, the Clinic Specialty Field will be required. (MENU PATH: PAS=>S=>PROF=>CPRO).

C. The Clinic Specialty screen has been relocated to display after the Clinic Profile Parameters rather than before it. (MENU PATH: PAS=>S=>PROF=>CPRO).

D. Appointment Types have two new fields, "Uneditable" and "Medical Appointment Type", added but do not require action. (MENU PATH: PAS=>S=>PROF=>APRO).

E. Note that the Appointment Detail Code screen is a new screen within the Clinic Profile CPRO.

F. The Workload Type field has been added to the following files:

  - PAS Templates file
  - Schedulable Entity file
  - Patient Appointment file.

G. The duration field has been added to the Schedulable Entity and Patient Appointment files. They will be populated based on the default value from the Appointment Type in the Provider profile.

3.1.4   Implementation Issues.

A.   Clinic Appointment Detail Codes picklist built in the Clinic Profile may be used when building Schedules and Templates or at booking.

3.2   TEMPLATES BUILD

3.2.1   Overview of Change

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Patient Appointment and Scheduling (PAS) Templates module has been modified to allow an authorized CHCS user the capability to:

  - Select up to three (3) appointment detail codes for any slot being added to or edited in a daily template for a provider in a medical clinic.

- Modify the appointment type duration when creating/editing a daily template for a provider in a medical clinic.

CHCS will permit the definition of Count or Non-count Workload Type for each slot in Schedule and Template Build. If the workload indicator for the clinic is non-count, all of the clinic's slots will automatically be set to non-count in the schedule/template and may not be changed. Otherwise the slot's Workload Type will default to count from the Clinic's profile. A user with the security key SD WK LOAD may override this value and enter non-count.

Appointment detail codes must be in the Appointment Detail Codes file before they can be linked to template/schedule slots. Standard Appointment Detail Codes may not be edited, but new site definable age Detail codes and other TMA approved Detail codes may be added via the option DFIL.

Users may modify the appointment type duration when creating/editing a daily template for a provider in a medical clinic. When creating or editing a daily template, CHCS defaults the duration of the appointment type selected from the specified provider's profile but will allow the authorized user to modify the duration at the individual slot level.

Only those appointment types that have the Medical Appt Type flag set to YES in the Appointment Type file may be added to a daily template.

3.2.2   Detail of Change

The basic changes in Templates Build permit a user to add/edit/delete up to three Appointment Detail codes to appointment slots, modify the Workload Type, and modify the appointment slot duration.

This Detail of Change section includes: 1) the functional dependencies of scheduling, 2) workflow subsections related to creating and maintaining schedules, and 3) the business rules that apply to schedules.

3.2.2.1   Functional Dependencies

1. Appointment detail codes must be in the Appointment Detail Codes file (e.g., 'age restriction' appointment detail codes) before they can be linked to template slots.

2. The clinic appointment detail code pick list must be populated before it can be accessed from the Template options. If no clinic appointment detail code pick list is created, the system will display the complete list of all current appointment detail codes to the user when queried from the Templates options.

3. When entering or editing detail codes in a daily template, you must select appointment detail codes from the clinic pick list or the complete master list.

4. A medical clinic must have the Clinic Type field in the Clinic Profile set to either 'Count' or 'Non-Count'.

5. The Workload Type for each Appointment Type linked to a Clinic and Provider Profile must be set to either 'Count' or 'Non-count'.

6. PAS Scheduling Supervisors tasked to create and maintain medical clinic profiles, templates and schedules must have the new **SD APPT STAND** security key. This security key will allow the Scheduling Supervisor to add/modify/delete Detail codes, Appointment Types, and to modify duration at the schedule slot level when creating or editing daily Templates and Schedules for a specific medical clinic provider in the PAS module on CHCS.

7. Supervisors or users who are permitted to edit the "Workload Type" from Count to Non-Count at the slot level must have the new security key **SD WK LOAD**.

3.2.2.2 Workflow

A. Create/Edit Templates

Scheduling supervisors will note that the look of this option has changed from a series of prompts to a screen.

To create or edit templates, use the following menu path.

1. **MENU PATH: PAS=>S=>TEMP=>CTEMP**

2. Once you have elected to create/edit a daily template, the system will prompt you for the clinic, provider and daily template ID (refer to Screen 3.2-1).

```
===================================Screen 3.2-1===================================

Create/Edit Daily Template

Select CLINIC:  PRIMARY CARE CLINIC      CLINIC   NAVY OUTPATIENT DIVISION

Select PROVIDER:  FROST,ROBERT                 FROST,ROBERT          099-32-1234
    OK? YES//   (YES)

Select Daily TEMPLATE ID:    MON PCC FROST
  Are you adding 'MON PCC FROST' as a new SCHEDULE TEMPLATE? Y  (YES)

==============================  End of Screen   ==============================
```

3. If you enter the name of a new daily template, the system will display the prompt

   'Are you adding [Daily Template ID] as a new Schedule Template? Y//'.

If yes, the system displays the Create/Edit Template screen (refer to Screen 3.2-2). CHCS will also redisplay the Select Daily TEMPLATE ID prompt and allow you to reenter the Daily TEMPLATE ID (refer to Screen 3.2-1).

4. If you enter an existing Daily TEMPLATE ID, CHCS will display the CREATE/EDIT DAILY TEMPLATE screen and action bar and allow you to view and edit the selected daily template (refer to screen 3.2-5).

```
=================================Screen 3.2-2=================================

Create/Edit Daily Template                          SD CREATE/EDIT DAILY TEMPLATE

              Clinic: PRIMARY CARE CLINIC
            Provider: FROST,ROBERT

         Day of Week: MONDAY
         Template ID: MON PCC FROST
         Description: RTN


  Filing ...

============================== End of Screen ==============================
```

5. Prior to entering the individual schedule slot data, the system allows you to enter the day of the week for which the daily template is being created, to update the template ID, and to enter a brief description of the daily template. All three fields are required. Once the data has been entered, the system allows you to enter data for the individual schedule slots in the template being created/edited (refer to Screen 3.2-3). New fields appear in bold.

```
=================================Screen 3.2-3=================================

Create template for MONDAY                          SD CREATE/EDIT DAILY TEMPLATE

              Clinic:  PRIMARY CARE CLINIC
            Provider:  FROST,ROBERT

          Start time:  0700
           Stop time:
     Number of slots:  10
    Appointment Type:   PCM
       Workload Type:  COUNT
       Slot Duration:  30 minutes
  Max # of Patients per Slot:  1
        Detail Codes:
PE
BPAD

         Slot comment: SLOT COMMENT XXXXXXXXXXXXXXXXXXXXXXXXXXX

============================== End of Screen ==============================
```

6. The system displays the name of the clinic and provider the daily template is being created for at the top of the SD Create/Edit Template screen. You may then enter Start Time and either Stop Time or the Number of Slots being created/edited.

7.   Once the daily template time range or number of slots has been entered, the system allows you to enter the Appointment Type to be used.

8.   Once the Appointment Type has been selected, CHCS will automatically default the Workload Type for the Appointment Type selected from the specified Clinic Profile.

9.   If the Clinic is defined in the Clinic profile as a "Count Clinic" (i.e., Clinic Type = Count) CHCS will allow you to edit the Workload Type to "Non-Count".

10. If the Clinic is defined in the Clinic Profile as a Non-Count Clinic (i.e., Clinic Type = Non-Count), the system will automatically set the Workload Type for this schedule slot to Non-Count and **not allow you to edit the Workload Type field for this schedule slot**.

11. The system automatically defaults the duration of the Appointment Type entered in the Duration field and allows you to edit the duration for the appointment type selected. The original duration displayed is the duration of the specified appointment type in the selected provider's Provider Profile.

12. As soon as you accept the default duration of the selected appointment type or enter a new appointment type duration, the system allows you to enter the maximum # of patients per slot for the selected time range or number of slots being created/edited at this time.

13. After the Max # of Patients per Slot has been entered, the system allows you to link up to three appointment detail codes for each template schedule slot being created/edited.

14. If the specified clinic maintains a clinic appointment detail code pick list, the system will allow you to select the appropriate appointment detail codes first from the clinic pick list and/or from the entire Appointment Detail Codes file by entering '??' in the Detail Codes field.

15. If you do not select an appointment detail code from the clinic pick list, the system will prompt you to view the entire appointment detail codes list for possible selection prior to returning to the SD Create/Edit Template screen.

16. The Detail Codes field is not a required field. If you wish to delete a previously entered detail code, you need only to position the cursor next to the Detail Codes entry and press the 'DELETE' key. The system will display the "Do you want to 'delete' this entry?" prompt prior to deleting the entry. If you respond 'Yes' to the prompt, the previously entered appointment detail code will be deleted. Detail Codes display next to the Duration field (Screen 3.2-4 below).

17. Once you have entered the appointment detail codes for the template schedule slot/s being entered/edited or pressed 'RETURN' to continue, the system will allow you to enter a slot comment for the slot/s being entered/edited.

18. As soon as you either enter a slot comment or press the 'RETURN' key to continue, the system displays the data just entered and prompts you to verify that it is 'OK to add these slots to [day]? Yes//' (refer to Screen 3.2-4). New fields appear in bold.

================================**Screen 3.2-4**==================================

Clinic: PRIMARY CARE CLINIC
  Provider: FROST,ROBERT
        Day: Monday

Start Time	Appt Type	**Wkl Type**	# per Slot	**Dur**	**Detail Codes**	Slot Comment
0700	PCM	1		30	PE BPAD	SLOT COMMENTXXXXXXXXXXXXX
0730	PCM	1		30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0800	PCM	1		30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0830	PCM	1		30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0900	PCM	1		30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0930	PCM	1		30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
1000	PCM	1		30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
1030	PCM	1		30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
1100	PCM	1		30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX

Press <RETURN> to continue
Ok to add these slots to Monday? Yes//
Complete for Monday? No//Y
Display the completed template for Monday? Yes//N

================================ **End of Screen** ================================

19. If you respond 'No' to the 'OK to Add…..?' prompt, the system redisplays the SD CREATE/EDIT TEMPLATE screen (refer to Screen 3.2-3) and allows you to edit the data just entered.

20. If you accept the default to add these slots to Monday, the system then prompts you to verify that the daily template for Monday is complete.

21. If you accept the default that the daily template is not complete, the system will redisplay the SD CREATE/EDIT TEMPLATE screen (refer to Screen 3.2-3) and allow you to enter new template schedule slots for the specified daily template (refer to Screen 3.2-3).

22. If you respond 'YES' to the 'Complete for [day]?' prompt, the system will file the daily template data and then prompt you to display the completed schedule for [day].

23. Once you have viewed the completed daily template schedule or elected not to display the daily template schedule, the system will display the Create/Edit Daily Template screen and action bar for the newly created template (refer to Screen 3.2-5).   New fields appear in bold.

===============================**Screen 3.2-5**==================================

CREATE/EDIT DAILY TEMPLATES

```
  Template ID:  MON PCC FROST
        Clinic:  PRIMARY CARE CLINIC
      Provider:  FROST,ROBERT
           Day:  Monday
```

```
Start    Appt  Wkl  # per
Time     Type  Type Slot   Dur  Detail Codes                    Slot Comment
======================================================================
0700  PCM   C   1    30  PE BPAD                  SLOT COMMENT XXXXXXXXXXXX
0730  PCM   C   1    30  PE BPAD                  SLOT COMMENT XXXXXXXXXXXX
0800  PCM   C   1    30  PE BPAD                  SLOT COMMENT XXXXXXXXXXXX
0830  PCM   C   1    30  PE BPAD                  SLOT COMMENT XXXXXXXXXXXX
0900  PCM   C   1    30  PE BPAD                  SLOT COMMENT XXXXXXXXXXXX
0930  PCM   C   1    30  PE BPAD                  SLOT COMMENT XXXXXXXXXXXX
======================================================================
Select (A)dd slots, (D)elete slots,  (M)odify slots, (V)iew slots, or (Q)uit: A// Q
```

============================== **End of Screen**   ==============================

24. The system allows you to add additional template schedule slots, delete previously added template schedule slots, modify existing template schedule slots and view the daily template in its entirety. Please refer to the Action bar in screen 3.2-5 above.

25. Action Bar

    a.   **Delete slots:** When you select (D)elete slots from the Create/Edit Templates action bar, the system will position the cursor in the middle window and allow you to select the daily template schedule slots to delete. Once the slot/s have been selected and you have pressed 'RETURN' to continue, the system displays the 'OK to delete slots? N//' prompt and allows you to accept the default or elect to delete the selected slots.

    b.   **Add slots:** When you select the (A)dd slots action or have selected a slot to edit, the system will display the SD Create/Edit Template screen (refer to Screen 3.2-3) and allow you to add slots or edit the previously selected slot.

    c.   **Modify slots:** If you select (M)odify slots, the system will position the cursor in the middle window and allow you to select the daily template schedule slots to modify.

             Once you have selected one or more schedule slots to modify, the system will redisplay the SD CREATE/EDIT DAILY TEMPLATE screen (refer to Screen 3.2-3) and allow you to modify the appropriate schedule slot data.

             When editing a daily template, if you select an appointment schedule slot to modify, the system will allow you to change the duration. The new duration for the appointment schedule slot selected may not overlap an existing schedule slot (e.g., you attempt to change duration of 'Mon 0900 PCM from 30 minutes to 60 minutes when a 'Mon 0930 PCM' schedule slot has already been created for the

specified daily template). If you attempt to file the daily template and a duration conflict exists, the system will notify you that an overlapping schedule slot exists. The system will redisplay the Daily Template and allow you to edit the appropriate schedule slot.

If you select multiple daily template schedule slots to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comment), the system allows you to enter the schedule slot data once for all the schedule slots selected. When the daily template is filed, the system will apply the updates to all the schedule slots selected.

3.2.2.3   Business Rules

1. You may select up to three appointment detail codes to link to an individual template schedule slot when creating or editing a daily template.

2. You may delete any appointment detail code linked to an individual template schedule slot when creating or editing a daily template.

3. The appointment type duration for a daily template schedule slot may be modified when creating or editing a daily template.

4. The appointment slot duration may be entered in one-minute increments.

5. When creating a daily template, the system will default the duration of the appointment type selected from the specified provider's profile but will allow you to modify the duration.

6. When editing a daily template, if you select an appointment schedule slot to modify, the system will allow you to change the duration. The new duration for the appointment schedule slot selected may not overlap an existing schedule slot (e.g., you attempt to change the duration of 'Mon 0900 PCM' from 30 minutes to 60 minutes when a 'Mon 0930 appointment schedule slot has already been created for the specified daily template.). If you attempt to file the daily template and a duration conflict exists, the system will notify you that an overlapping schedule slot exists. The system will redisplay the Daily Template and allow you to edit the appropriate schedule slot.

7. If you select multiple daily template schedule slots to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comment), the system allows you to enter the schedule slot data once for all the schedule slots selected. When the daily template is filed, the system will apply the updates to all the schedule slots selected.

8. When you file the data for the multiple schedule slots selected, the system will verify that the total duration for the slots selected does not overlap any existing daily template schedule slot.

9. Only those appointment types that have the Medical Appt Type flag set to 'YES' in the Appointment Type file may be added to a daily template. If a user elects to create a

Template using one or more nonstandard appointment types that do not have the Medical Appt type flag in the Appt Type Profile set to "YES", the system will display the following message to the user and prevent the user from creating a new template as is: "This template may not be used to create schedules until the following appointment type/s is changed or the Medical Appt Type flag in the Appointment Type Profile is set to YES:

[Appointment Type]   [Appointment Type]"

10. If the Clinic Type field in the Clinic Profile is set to 'Non-Count', the system will automatically default the Workload Type field to 'Non-Count' for each Appointment Type being added to a daily template and make the field non-editable.

11. If the Clinic Type field in the Clinic Profile is set to 'Count', the system will default the current Workload Type for each selected Appointment Type being added to a daily Template from the appropriate Provider Profile.

12. A PAS Scheduling Supervisor with the SD WK LOAD security key may modify the Workload Type for each schedule slot being added to or edited in a daily schedule template for a provider in a 'Count' medical clinic.

13. Only those appointment types that have the Medical Appt Type flag set to 'YES' in the Appointment Type file may be added to a daily template.

14. When a daily template is filed, the system will store the Workload Type for each schedule slot in a daily template in the PAS Templates file.

When the appointment status is changed from Pending to OCC-SVC, ADMIN, or LWOBS using EOD Processing, the system will automatically set the Workload Type for the appointment being filed to Non-Count.

3.2.3   File and Table Change

There are no file and table changes that require user input; however, the supervisor should be aware of the following items.

A. A conversion will occur that will convert previous appointment Schedule slot comments to new Detail Codes in the Templates. Please refer to section 3.7 of this document for conversion details. Verify that the template appointment slot comments prior to the load are the format defined in section 3.1.2.5 B or they will not be converted.

B. The Template screen has changed from a series of prompts to a full screen with defined fields. No action is needed.

3.2.4 Implementation Issues.

A. Print out templates prior to APS II software load and compare them with templates after the load.

B. If appointment slot comments were not defined as specified in section 3.1.2.5(B), users may have to edit all templates and correct them post-load.

3.3 SCHEDULES

3.3.1 Overview of Change

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Patient Appointment and Scheduling (PAS) Schedules module has been modified. You will be able to:

- Select up to three appointment detail codes for any appointment slot being added to or edited in a schedule for a provider in a medical clinic.

- Modify the appointment type duration when creating/editing a schedule for a provider in a medical clinic.

- Modify the Workload Type in each slot from Count to Non-Count.

3.3.2 Detail of Change

The basic changes in Schedules include selecting up to three appointment detail codes that may be added to appointment slots, modifying appointment type duration, and changing the Workload Type to non-count.. Users who may perform these functions will need the appropriate security keys (refer to section 2.5).

This Detail of Change section includes: 1) the functional dependencies of scheduling, 2) workflow subsections related to creating and maintaining schedules, and 3) the business rules that apply to schedules.

3.3.2.1 Functional Dependencies

1. Appointment detail codes must be in the Appointment Detail Codes file before they can be linked to schedule slots.

2. The clinic appointment detail code pick list should be populated so that it displays first for all schedule slots being created on the fly. If no clinic appointment detail code pick list is created, the system will display the complete list of all current appointment detail codes to you when asked from the Schedule options.

3. When entering or editing detail codes in a schedule, you must select appointment detail codes from the clinic pick list or the complete master list.

4. A medical clinic must have the Clinic Type field in the Clinic Profile set to either Count or Non-Count.

5. The Workload Type for each Appointment Type linked to a Clinic Profile must be set to either Count or Non-count.

6. PAS Scheduling Supervisors tasked to create and maintain medical clinic profiles, templates and schedules must have the new SD WK LOAD security key. This security key will allow the Scheduling Supervisor to modify the Workload Type field at the individual schedule slot level when creating or editing daily Templates and Schedules for a specific medical clinic provider in the PAS module on CHCS.

7. MCP Health Care Finders (HCF's) and Front Desk Clerks tasked to book appointments, check patients in, or perform End of Day Processing, must have the SD WK LOAD security key in order to modify the Workload Type field. In order to modify the Appointment Type and Detail codes while booking appointments and EOD processing, the clerks will have to possess the SD APPT STAND security key.

3.3.2.2   Workflow to Create and Maintain Schedules

A.   Create Schedules

The Create Schedules option is used to develop daily schedules for providers in their clinics for a specified date range.

Use the following menu path.

1. **MENU PATH: PAS=>S=>SCHE=>CSCH**

2. When creating a schedule, the system will prompt you to enter the clinic, provider, and date range for the schedule being created (refer to Screen 3.3.1). The process when using a template has not changed.

Note: When printing schedules via PSCH previously, if the provider had no schedules, a message would appear stating, "NO SCHEDULES FOR SMITH, JANE L EXIST FOR THIS TIME FRAME!". With the new functionality a blank screen appears with the message to "Hit return to continue" at the bottom of the screen.

```
================================Screen 3.3-1====================================

Create Schedules

Select CLINIC: PRIMARY CARE CLINIC
Select PROVIDER: FROST,ROBERT

Enter SCHEDULE START DATE: 07 Jun 2000// 07AUG  (07 Aug 2000)

Enter SCHEDULE END DATE: 07 Aug 2000//   (07 Aug 2000)

Use templates to create schedules? Yes//
Select Template ID: MON PCC FROST     DAY  MONDAY
Display template? Yes//
```

=============================== **End of Screen**   ===============================

3. Once the schedule date range is entered, the system will display the prompt:

    'Use templates to create schedules? Yes//'.

    If you respond with 'No' to the prompt, the system will display the SD Create/Edit
    Schedules screen and allow you to create a new schedule for the specified clinic, provider
    and schedule date range.

4. The system will then allow an authorized user to enter Start Time, Stop Time or Number of
    slots, Appointment Type, Slot Duration, Maximum number of patients per slot, Appointment
    Detail Codes, and Slot Comment. Once you file the schedule, the system will prompt if it is
    "OK to Add Slots to the schedule?" Once the schedule slots have been added and/or edited,
    the system will allow you to add additional schedule slots to the schedule or file the
    completed schedule. If you elect to file the schedule, the system will display the CREATE
    SCHEDULE screen (refer to Screen 3.3-3) and allow you to file the completed schedule.

5. If you accept the default to use a template to create the new schedule, the system will prompt
    you to select the Template ID to use to create the schedule (refer to screen 3.3-1).

6. Once the Template ID has been entered, the system will prompt you to display the template
    that will be used to create the schedule.

7. If you accept the default, the system will display the template (refer to Screen 3.3-2). New
    fields are bolded.

===================================Screen 3.3-2====================================

Template ID: MON PCC FROST   Page 1
Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT
Day of Week: Monday

```
Start   Appt  Wkl # per
Time    Type  Type Slot   Dur   Detail Codes                     Slot Comment
===============================================================================
0700    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
0730    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
0800    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
0830    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
0900    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
0930    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
1000    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
1030    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
1100    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
1130    PCM   C    1      30 PE BPAD                              SLOT COMMENT XXXXXXXXXXXXXXXX
Press <RETURN> to continue
```

Create schedules for Monday? Yes//

============================== **End of Screen** ================================

8. The template displayed includes template ID, clinic, provider, and the day of week the template is for.   Each schedule slot in the template includes: the start time, appointment type, workload type, number of patients per slot, appointment duration, detail codes (if any), and slot comments (if entered).

9. After displaying the template selected for review, the system displays the prompt: 'Create schedules for [day]? Yes//'.

    a. If you respond with 'No' to the prompt, the system will redisplay the Select Clinic prompt (refer to Screen 3.3-1) and allow you to either exit the option or elect to create a new schedule.

    b. If you accept the default "Yes" to create a schedule for [day], the system will redisplay the Create Schedules screen (refer to Screen 3.3-3).

```
================================Screen 3.3-3===================================

Create Schedules
              Clinic: PRIMARY CARE CLINIC
              Provider:  FROST,ROBERT

 Week of      Sun  Mon  Tue  Wed  Thu  Fri  Sat
06 Aug 2000       X
Is this schedule correct? Yes//

... SCHEDULE IS BEING FILED.  PLEASE WAIT ...
 < Schedule created for 07 Aug 2000 to 07 Aug 2000 >
Display Schedules? No//Y

Select DEVICE:

==============================  End of Screen   ===============================
```

10.   The Create Schedules screen displays along with the clinic and provider. The system
       displays an overview of the schedule being created beginning with the first week for the
       schedule date range specified. Each day for which a schedule is being created is marked
       with an 'X'. The system also displays the prompt 'Is this schedule correct? Yes//'.

11.   If you respond with 'No' to the prompt, the system redisplays the Create Schedules
       screen (refer to Screen 3.3-1) and allows you to create a new schedule or exit the option.

12.   If you accept the default to create the schedule, the system files the schedule and then
       prompts you to display the newly created schedule to the appropriate output device (refer
       to Screen 3.3-4). New fields are bolded.

==================================**Screen 3.3-4**=====================================

Navy Outpatient   30 Jun 2000@1005 Page 1

PROVIDER SCHEDULE
Monday 07 Aug 2000

Division: NAVY OP
  Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT

Start Time	Appt Type	**Wkl Type**	Slots/ Book	**Dur**	**Detail Codes**	Slot Comment	Slot Status
0700	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
0730	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
0800	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
0830	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
0900	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
0930	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
1000	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
1030	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
1100	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------
1130	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXX	-------------

Select (O)pen schedules, (H)old for future release, (W)ait List: O//

OPEN Schedules

... SCHEDULE IS BEING OPENED. PLEASE WAIT ...
Display Schedules? Yes//N
Press <RETURN> to continue

============================== **End of Screen**   ================================

13.   The system then displays the Create Schedules action bar and allows you to:

- (O)pen schedules for appointment booking

- (H)old schedules for future release

- (W)ait List schedules if the specified clinic maintains a Wait List for appointment booking.

14.   If you elect to open the schedules, the system opens the schedule slots and then prompts you to display the newly created schedule.

Creating Schedule without Templates

1. **MENU PATH: PAS=>S=>SCHE=>CSCH**

2. If you elect to create a schedule, the system will prompt you to enter clinic, provider, and date range for the schedule being created (refer to Screen 3.3-4a).   The new field appearance is bolded.

=================================**Screen3.3-4a**===================================

Create Schedules

Select CLINIC: PRIMARY CARE CLINIC
Select PROVIDER: FROST,ROBERT

Enter SCHEDULE START DATE: 07 Jun 2000// 07AUG (07 Aug 2000)

Enter SCHEDULE END DATE: 07 Aug 2000//   (07 Aug 2000)

Use templates to create schedules? Yes//No
Create Schedule for MONDAY? Yes//

============================= **End of Screen**   ==============================

3. Once the schedule date range is entered, the system will display the 'Use templates to create schedules? Yes//' prompt. If you respond 'No' to the prompt, the system will display the Create Schedule for [day] prompt.

4. When you accept the default the system will display the SD Create/Edit Schedules screen (refer to Screen 3.3-4b) and allow you to create a new schedule for the specified clinic, provider and schedule date range. The new fields are bolded.

=================================**Screen 3.3-4b**==================================

Create schedule for MONDAY   SD CREATE/EDIT SCHEDULE

                Clinic: PRIMARY CARE CLINIC
              Provider: FROST,ROBERT

            Start time: 0700
             Stop time:
       Number of slots: 10
      Appointment Type: PCM
      Workload Type: COUNT
      Slot Duration: 30 minutes
  Max # of Patients per Slot: 1
           Detail Codes:
PE
BPAD

            Slot comment: SLOT COMMENT XXXXXXXXXXXXXXXXXXXXXXXXXXXX

============================= **End of Screen**   ==============================

5. The system displays the name of the clinic and provider the daily template is being created for at the top of the SD Create/Edit Template screen. You may then enter Start Time and either Stop Time or the Number of Slots being created/edited.

6. Once the schedule time range or number of slots has been entered, the system allows you to select an Appointment Type for the schedule slot.

7. Once the Appointment Type has been selected, the system will automatically default the WORKLOAD TYPE for the Appointment Type selected from the specified Clinic's Provider Profile.

8. If the Clinic is defined in the Clinic profile as a Count Clinic (i.e., Clinic Type = Count) CHCS will allow you to edit the Workload Type from Count to Non-Count.

9. If the Clinic is defined in the Clinic Profile as a Non-Count Clinic (i.e., Clinic Type = Non-Count), the system will automatically set the Workload Type for this schedule slot to Non-Count and not allow you to edit the Workload Type field for this schedule slot.

10. When you file the schedule, CHCS will store the newly created/edited daily template data in the Schedulable Entity file.

B.   Maintain Schedules

The Maintain Schedules menu option (MMSC) is used to modify, add or delete schedule slots and edit Workload Type from Count to Non-Count. Modifying schedule slots includes the ability to change appointment types, workload type, number of patients per slot, slot duration, detail codes and/or add slot comments. Use the following menu path.

1. MENU PATH: PAS=>S=>SCHE=>MSCH=>MMSC

2. When modifying a schedule, the system prompts you to enter the clinic, provider, and schedule date range.

3. Once the data has been entered, the system displays the Modify Schedules screen and action bar with the schedule data displayed in the middle window of the Modify Schedules screen (refer to Screen 3.3-5). The screen is basically unchanged.

===============================**Screen3.3-5**===================================

Modify Schedules   07 Aug 2000

      Clinic: PRIMARY CARE CLINIC
    Provider: FROST,ROBERT
Dates selected: 07 Aug 2000 (MONDAY) to 07 Aug 2000 (MONDAY)

Start Time	Appt Type	**Wkl Type**	# per Slot	**Dur**	**Detail Codes**	Slot Comment
0700	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
0730	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
0800	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
0830	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
0900	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
0930	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
1000	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
1030	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
1100	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX
1130	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXX

Select (M)odify, (A)dd, (D)elete, or (Q)uit: M//

=============================== **End of Screen** ================================

4. CHCS allows you to:

- Modify appointment type, duration slot comments, number of patients per slot, and appointment detail codes
- Modify the Workload Type from Count to Non-Count in Clinics that are considered Count.
- Add schedule slots to the schedule.
- Delete schedule slots from the schedule.

5. If you elect to modify the schedule, the system positions the cursor in the middle window of the Modify Schedules screen and allows you to select the schedule slots to modify (refer to Screen 3.3-6). New fields are bolded.

```
================================Screen 3.3-6==================================

Modify Schedules                                          07 Aug 2000

       Clinic:  PRIMARY CARE CLINIC
     Provider:  FROST,ROBERT
Dates selected:  07 Aug 2000 (MONDAY) to 07 Aug 2000 (MONDAY)
-------------------------------------------------------------------------------
  Start    Appt  Wkl  # per
  Time    Type  Type  Slot  Dur  Detail Codes              Slot Comment
===============================================================================
 07 Aug 2000 (MONDAY)
*0700  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
*0730  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
 0800  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
 0830  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
 0900  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
 0930  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
*1000  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
 1030  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
 1130  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXX
===============================================================================
Use SELECT KEY to select slots to modify
Selecting the Date selects the entire day
F9 to modify all dates displayed


==============================  End of Screen   ==============================
```

6. When you select the schedule slot/s to be modified and press the 'RETURN' key, the system displays the prompt 'Are you sure you want to modify these slots?' (refer to Screen 3.3-7).

```
================================Screen 3.3-7==================================

Modify Schedules              07 Aug 2000

       Clinic:  PRIMARY CARE CLINIC
     Provider:  FROST,ROBERT
Dates selected:  07 Aug 2000 (MONDAY) to 07 Aug 2000 (MONDAY)
-------------------------------------------------------------------------------
  Start    Appt  Wkl  # per
  Time    Type  Type  Slot  Dur  Detail Codes              Slot Comment
===============================================================================
 07 Aug 2000 (MONDAY)
 *0700  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXXX
 *0730  PCM   C    1     30  PE BPAD           SLOT COMMENT XXXXXXXXXXXX
  0800  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXXX
  0830 PCM    C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXXX
  0900  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXXX
  0930  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXXX
 *1000  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXXX
  1030  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXXX
  1130  PCM   C    1    30  PE BPAD            SLOT COMMENT XXXXXXXXXXXX
===============================================================================
Are you sure you want to modify these slots?


==============================  End of Screen   ==============================
```

When you answer the question with 'YES', the system displays the SD Create/Edit Daily Schedule screen and allows you to edit all fields for the selected slots (refer to Screen 3.3-8).

New fields are in bold print.

=================================**Screen 3.3-8**=================================

<div style="text-align:center">SD CREATE/EDIT SCHEDULES</div>

Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT

Appointment Type: PCM
Slot Duration: 30 minutes
Workload Type: Count
Max # of Patients per Slot: 1
Detail Codes:
PE
BPAD

Slot comment: SLOT COMMENT XXXXXXXXXXXXXXXXXXXXXXXXXXXXX

=============================== **End of Screen** ===============================

7. When editing a schedule, if you select an appointment schedule slot to modify, the system will now allow you to change the duration. If the new duration for the appointment schedule slot selected overlaps an existing schedule slot (e.g., attempting to change the duration of 'Mon 0900 PCM' from 30 minutes to 60 minutes when a 'Mon 0930 PCM' schedule slot has already been created.), CHCS will notify you that an overlapping schedule slot exists. The system will redisplay the SD CREATE/EDIT SCHEDULE screen and allow you to edit the appropriate schedule slot. If the duration is less then the original slot, CHCS displays the message "New Duration is LESS than the existing duration, Ok to Change?"

8. If you select multiple daily schedule slots to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comment), the system allows you to enter the schedule slot data once for all the schedule slots selected. When the schedule is filed, the system will apply the updates to all the schedule slots selected.

9. If you select three slots, no matter what the slot data is, the system assumes you want to change three selected slots to be the same.

10. When you have edited all the data and pressed the 'RETURN' key to continue, the system redisplays the Modify Schedules screen with the schedule slots updated appropriately and allows you to either select another action or exit (refer to Screen 3.3-9).

11. When the user files the schedule, the system will store the newly created/edited daily schedule data in the Schedulable Entity file.

================================ **Screen 3.3-9**====================================

Modify Schedules

      Clinic: PRIMARY CARE CLINIC
     Provider: FROST,ROBERT
Dates selected: 07 Aug 2000 (MONDAY) to 07 Aug 2000 (MONDAY)

Start Time	Appt Type	**Wkl Type**	# per Slot	**Dur**	**Detail Codes**	Slot Comment
0700	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXX
0730	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXX
0800	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXX
0830	PCM	C	1	30	BPAD	SLOT COMMENT XXXXXXXXXXXXXXX
0900	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXX
0930	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXX
1000	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXX
1030	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXX
1130	PCM	C	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXX

Select (M)odify, (A)dd, (D)elete, or (Q)uit: M//

============================== **End of Screen** ==============================

3.3.2.3   Business Rules

1. Up to three appointment detail codes may be selected to link to an individual schedule slot when creating or editing a schedule.

2. Any appointment detail code linked to an individual schedule slot may be deleted when editing a schedule.

3. The appointment type duration for a schedule slot may be modified when no template is used to create a schedule or when a schedule is being edited.

4. When editing a schedule, if you select an appointment schedule slot to modify, CHCS will allow you to change the duration. If the new duration for the appointment schedule slot selected overlaps an existing schedule slot (e.g., attempting to change duration of 'Mon 0900 PCM' from 30 minutes to 60 minutes when a 'Mon 0930 PCM' schedule slot has already been created.) CHCS displays a message that the slot duration is greater then original duration.

5. If you select multiple daily schedule slots to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comments), the system allows you to enter the schedule slot data once for all the schedule slots selected. When the schedule is filed, the system will apply the updates to all the schedule slots selected.

6. Only those appointment types that have the Medical Appt Type flag set to 'YES' in the Appointment Type file may be added to a schedule.   If a user elects to create a schedule using a daily or weekly schedule that contains one or more nonstandard appointment types that do not have the Medical Appt type flag in the Appt Type Profile set to "YES", the

system will display the following message to the user and prevent the user from creating a new schedule using that template as is:

"This template may not be used to create schedules until the following appointment type/s is changed or the Medical Appt Type flag in the Appointment Type Profile is set to YES:

[Appointment Type]   [Appointment Type]"

7. If the Clinic Type field in the Clinic Profile is set to Non-Count, the system will automatically default the Workload Type field to Non-Count for each Appointment Type being added to a provider schedule and make the field non-editable.

8. If the Clinic Type field in the Clinic Profile is set to Count, the system will default the current Workload Type for each selected Appointment Type being added to a provider schedule from the appropriate Clinic Profile.

9. The user needs the SD APPT STAND security key to modify the Appointment Type, duration and detail codes.

10. A PAS Scheduling Supervisor with the SD WK LOAD security key may modify the Workload Type for each schedule slot being added to or edited in a schedule for a provider in a Count medical clinic.

11. If the authorized CHCS user elects to create a provider schedule using a daily or weekly template, the Workload Type for each Schedule slot being created will default from the daily or the weekly template being used to create the schedule.

12. If a provider schedule is created using a daily or weekly template, you may only edit the Workload Type for the individual schedule slots using the Maintain Schedules option.

3.3.3   File and Table Change

A. Appointment detail codes must be defined in the Appointment Detail Codes file to link to schedule slots. (MENU PATH: PAS=>S=>SCHE=>CSCH).

B. When editing a schedule slot(s), the fields to be edited appear on one screen. No action is required. (MENU PATH: PAS=>S=>SCHE=>MSCH=>MMSC).

C. Non-standard Appointment Types (Medical Appt Type flag = No) will be screened out when new schedules and templates are created or edited.

D. Appointment Slots Workload Type can be changed from Count to Non-Count on an individual slot level rather then having to use End of Day Processing while processing a schedule.

3.3.4   Implementation Issues

A. If no clinic appointment detail code pick list is created, the system will display the complete list of all current appointment detail codes to the user when asked from the Schedule options.

B. The process of creating Schedules from Templates has not changed.

C. Appointment Type, detail codes, duration and workload type may also be edited when modifying schedules.

3.4   APPOINTMENT BOOKING

3.4.1   Overview of Change

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Managed Care Program (MCP) Health Care Finder (HCF) Booking module has been modified to allow you capabilities as follows:

- Search for available appointments by Standard Appointment Type and/or Detail Code(s).

- View up to three appointment detail codes linked to any schedule slot being displayed on the available appointment display list.

- Select an appointment detail code from the clinic pick list and/or from the complete appointment detail code pick list to link to an appointment being booked.

- Delete an appointment detail code linked to an appointment being booked.

- Permit you to change the appointment type for an appointment at the time of booking.

- Enter an Appointment Type/Detail Code Change Reason.

- Modify workload type for Count clinics.

- Provide a Self-Referral Appointing option. This option will permit appointing to providers in Specialty clinics without entry of a referral.

- Provide the capability to book a PCM appointment for an Active Duty patient whose enrolling DMIS ID is defined as Ops Forces, with any PCM in any MCP Provider Group to which the patient's assigned PCM is a member.

Additionally, the FILE APPOINTMENT screen was modified for all booking options (i.e., PCM BOOKING, REFERRAL BOOKING, NON-ENROLLED BOOKING, SELF-REFERRAL BOOKING, and BROWSE) in the Health Care Finder Booking module in MCP to allow an authorized Health Care Finder (HCF) with the **SD WK LOAD** security key to modify the workload type for the schedule slot being booked. When the appointment is filed, the CHCS will store the Workload Type along with the appointment data in the Patient Appointment file.

In addition, as part of processing appointment data, the Individual Patient Check In and End of Day Processing options have been modified to allow an authorized Front Desk Clerk with the **SD WK LOAD** security key to modify the workload type linked to a scheduled appointment when the patient is checked in and/or when end of day (EOD) processing is done. Additionally, in EOD processing, an authorized clerk with the security key SD APPT STAND, may add/edit/delete Appointment Detail codes linked to appointment slots.

Appointment slots that contain Slot Comments will have a tilde (~) to the left of the appointment slot. If a user wishes to view the Slot Comment, the cursor should be positioned to the left of the appointment slot and the F9 function key used to view the details of the appointment slot including the Slot Comment. (Refer to Section 3.4.2.2 P for details).

3.4.2   Detail of Change

This Detail of Change section includes: 1) the functional dependencies of appointment booking, 2) the workflow of all the various types of booking, and 3) the business rules that apply to appointment booking.

3.4.2.1   Functional Dependencies

1. Appointment detail codes must be in the Appointment Detail Codes file before they can be linked to an appointment being booked.

2. The clinic appointment detail code pick list should be populated before it can be accessed from the HCF Booking options. If no clinic appointment detail code pick list is created, the system will display the complete list of all current appointment detail codes when queried from the HCF Booking options.

3. When entering or editing appointment detail codes during the booking process, you may select appointment detail codes from the clinic pick list or the complete master list.

4. A medical clinic must have the Clinic Type field in the Clinic Profile set to either Count or Non-Count.

5. The Workload Type for each Appointment Type linked to a Clinic and Provider Profile must be set to either Count or Non-count.

6. The Health Care Finder (HCF)/Booking Clerk tasked to book the appointments for a provider in a medical clinic must have the new SD WK LOAD security key. This security key will allow an authorized HCF/Booking clerk to modify the Workload Type field defaulted from the individual schedule slot in the Schedulable Entity file on the FILE APPOINTMENT screen in all HCF Finder Booking options in the MCP module on CHCS. The Booking clerk/Health Care Finder possessing the SD APPT STAND security key will be able to change appointment types, duration, and change/add detail codes. (Refer to section 3.4.3 for suggestions on who should possess those security keys.

7.   The Front Desk Clerk tasked to enter Unscheduled Visits, Check patients in, or do End of Day processing must have the SD WK LOAD security key in order to change the Workload Type. Please refer to section 3.4.3 for suggestions on who should possess the security key.

3.4.2.2   Workflow of Appointment Booking

New to appointment booking is the selection of up to three detail codes linked to schedules. Booking clerks may also change appointment types at the time of booking and enter a change reason. A Self-Referral option is now also available.

A.   PCM Booking

The PCM Booking option is used to book an enrolled patient to his/her Primary Care Manager. . The term, 'DURATION' in all booking screens refers to the length of an appointment slot built into the templates and schedules.

1. **MENU PATH: PAS=>M=>HMCP=>BHCF**

2. As soon as you select the Health Care Finder Booking option, the system firsts prompts you to select a patient. Once the patient has been selected, the system displays the Demographics Screen. You are given the option to edit the patient demographics.

3. When you elect to continue with the booking process, the system displays the Health Care Finder Booking Screen. Based on the selected patient's enrollment status, the system allows you to select PCM Booking (i.e., primary care booking for enrolled patients), Non-Enrolled Booking (i.e., primary care booking for non-enrolled patients, Referral Booking (i.e., specialty care booking for both enrolled and non-enrolled patients) and/or Log Non-MTF Appointment.

4. When you select PCM Booking from the HCF Booking action bar, the system prompts you to enter an ATC category prior to searching for and displaying the initial available appointment display list. The system will allow you to select a slot to book or press 'RETURN' to display the PCM MTF Booking Search Criteria screen (refer to Screen 3.4-1). New fields are bolded.

```
================================= Screen 3.4-1 ===================================

                        PCM MTF BOOKING SEARCH CRITERIA
        Patient: BLITON,JERALD                        FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT         PLOC Phone: 234-5678
Detail Codes:(New Field)                              ATC Category:  ACUTE
Provider: PRIMARY CARE GROUP                          Appt Type:
    Location: 23708                                      Spec Type:
 Clinic Spec:                                         Provider Spec:
 Date Range: 03 Jul 2000 to 04 Jul 2000               Days of Week: M TU W TH F SA S
 Time Range: 0001 to 2400                             Duration:
=================================================================================
 Patient Home Phone: 619 546 6121    Patient Duty Phone: 619 535 7265




=================================================================================
Select (C)hange Search Criteria, Appt (S)earch, Appt (R)efusal, (B)rowse,
    (T)el-Consult, or (Q)uit: C// C

============================== End of Screen  ==============================
```

5. The Detail Codes and Duration have been added as Booking Search Criteria in the header on all MCP Booking screens. Some of the header fields have also been moved around. When you elect to change the booking search criteria, the system will display in the middle window of the PCM MTF Booking Search Criteria screen a list of all the booking search criteria that you may modify for the appointment search (refer to Screen 3.4-2). New fields are bolded.

```
=================================Screen 3.4-2===================================

                        PCM MTF BOOKING SEARCH CRITERIA
        Patient: BLITON,JERALD                        FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT         PLOC Phone: 234-5678
Detail Codes:(New Field)                              ATC Category:
Provider: PRIMARY CARE GROUP                          Appt Type:
    Location: 23708                                      Spec Type:
 Clinic Spec:                                         Provider Spec:
 Date Range: 03 Jul 2000 to 04 Jul 2000               Days of Week: M TU W TH F SA S
 Time Range: 0001 to 2400                             Duration:
=================================================================================
  Access to Care Category
  Place of Care
  Provider
* Appointment Type
* Detail Codes
  Duration
  Dates
+ Time Range
=================================================================================
Use SELECT key to select SEARCH CRITERIA

============================== End of Screen  ==============================
```

6. If you select Appointment Type, Detail Codes, and Duration from the search criteria list, the system will first prompt you to enter the new appointment type, up to three appointment

detail codes and duration as a series of prompts (refer to Screen 3.4-3). New fields are bolded.

```
==================================Screen 3.4-3==================================

                          PCM MTF BOOKING SEARCH CRITERIA
        Patient: BLITON,JERALD                          FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT           PLOC Phone: 234-5678
Detail Codes: (New Field)                               ATC Category:  Acute
Provider: PRIMARY CARE GROUP                            Appt Type:
     Location: 23708                                       Spec Type:
   Clinic Spec:                                          Provider Spec:
   Date Range: 03 Jul 2000 to 04 Jul 2000               Days of Week: M TU W TH F SA S
   Time Range: 0001 to 2400                             Duration:
================================================================================
   Access to Care Category
   Place of Care
   Provider
*  Appointment Type
*  Detail Codes
*  Duration
+
Dates===========================================================================
Select APPT TYPE:  PCM
Select SLOT DURATION:  30 minutes
Select DETAIL CODE:  PE
Select ANOTHER: BPAD
Select ANOTHER:


================================  End of Screen   ================================
```

7. Once you have entered or carriage returned through the DETAIL CODE field, the system will redisplay the PCM MTF Booking Search Criteria screen and action bar with the new search criteria displayed in the header (refer to Screen 3.4-4). New fields are in bold.

```
==================================Screen 3.4-4==================================

                          PCM MTF BOOKING SEARCH CRITERIA
        Patient: BLITON,JERALD                          FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT           PLOC Phone: 234-5678
Detail Codes: PE BPAD  ← (new)                          ATC Category: Acute
Provider: PRIMARY CARE GROUP                            Appt Type:
     Location: 23708                                       Spec Type:
   Clinic Spec:                                          Provider Spec:
   Date Range: 03 Jul 2000 to 04 Jul 2000               Days of Week: M TU W TH F SA S
   Time Range: 0001 to 2400                             Duration: 30
================================================================================
   Patient Home Phone: 619 546 6121     Patient Duty Phone: 619 535 7265




================================================================================
Select (C)hange Search Criteria, Appt (S)earch, Appt (R)efusal, (B)rowse,
    (W)ait List Add, (T)el-Consult, or (Q)uit: C//


================================  End of Screen   ================================
```

8. You may elect to search for available appointment slots by appointment type only and not limit the search by entering an appointment detail code and/or appointment duration. If so, then the system will search for and display all available appointment slots with the specified appointment type regardless of any appointment detail codes or appointment duration linked to the available appointment slots.

9. You may also narrow the appointment search by entering appointment type, slot duration and up to three appointment detail codes as secondary appointment search criteria. The system will then search for and display only those available appointment slots with the specified appointment type, slot duration and detail codes or those that have a subset of the detail codes entered as search criteria (refer to Screen 3.4-5). New fields are in bold.

Note: Appointment slots that contain Slot Comments will have a tilde (~) to the left of the appointment slot. If a user wishes to view the Slot Comment, the cursor should be positioned to the left of the appointment slot and the F9 function key used to view the details of the appointment slot including the Slot Comment. (Refer to Section 3.4.2.2 P for details).

```
================================Screen 3.4-5===================================

                         PCM MTF BOOKING SEARCH CRITERIA
       Patient: BLITON,JERALD                          FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT          PLOC Phone: 234-5678
Detail Codes: PE BPAD  ← (new)                         ATC Category: Acute
      Provider: PRIMARY CARE GROUP                      Appt Type:  PCM
      Location: 23708                                   Spec Type:
   Clinic Spec:                                        Provider Spec:
   Date Range: 03 Jul 2000 to 04 Jul 2000              Days of Week: M TU W TH F SA S
   Time Range: 0001 to 2400                            Duration:  30
===============================================================================
 ~ 07 Aug 00 MON 0900   PCM   1/0  30  PE BPAD
   07 Aug 00 MON 0930   PCM   1/0  30  PE BPAD
 * 07 Aug 00 MON 1030   PCM   1/0  30  PE BPAD BPNPR
 ~ 07 Aug 00 MON 1100   PCM   1/0  30  PE BRAD BPNPR
===============================================================================
Use SELECT key to select appointment(s) to be booked
Press F9 to view additional appointment data

==============================  End of Screen   ===============================
```

10. You may then select one or more slots to book, or position the cursor next to an available slot and press F9 to view additional appointment data (refer to Screen 3.4-6).

11. If you press the 'EXPAND' key (F9), the appointment data for the selected slot will be displayed in its entirety in the middle window of the BOOKING Search Criteria. You may view the data by pressing 'NEXT' and 'PREV' keys. New fields are bolded.

=================================**Screen 3.4-6**=================================

PCM MTF BOOKING SEARCH CRITERIA

Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT   PLOC Phone: 234-5678
Detail Codes:(New Field)   ATC Category: Acute
   Provider: PRIMARY CARE GROUP   Appt Type: PCM
   Location: 23708   Spec Type:
 Clinic Spec: Provider Spec:
 Date Range: 03 Jul 2000 to 04 Jul 2000   Days of Week: M TU W TH F SA S
 Time Range: 0001 to 2400   **Duration**: 30
===

        [MON 1030 PCM 1/0 30 PE BPAD BPNPR
          PE   PHYSICAL EXAMINATION
          BPAD   ACTIVE DUTY ONLY
          BPNPR   NO PRIME

        SLOT COMMENT XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX]
        Facility: NBMC NAVSTA SEWELLS   ATC Reporting: YES
        Division: NAVY OUTPATIENT DIVISION   ATC Category: ACUTE
         Building Name: ATC Standard: 24 HRS
        Building Number:
         Street Address:
        ZIP: 23708
        City: PORTSMOUTH
        State: VIRGINIA
        Name: PRIMARY CARE CLINIC – NO
        Clinic Location:
        Clinic Availability:
        Telephone: 234-5678
         Provider: PRIMARY CARE GROUP
===
Use NEXT SCREEN/PREV SCREEN keys to view text or Press RETURN to continue

============================== **End of Screen**   ==============================

12. If you select an appointment slot to book and press the 'RETURN' key, the system displays the BOOKING SEARCH CRITERIA screen and allows you to book the appointment (refer to Screen 3.4-7). If necessary, you should (M)odify appointment data before filing the appointment to reflect the actual care scheduled for the patient.   New fields are bolded.

```
=================================Screen 3.4-7=================================

                        PCM MTF BOOKING SEARCH CRITERIA
       Patient: BLITON,JERALD                        FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT        PLOC Phone: 234-5678
 Detail Codes: PE BPAD  ← (new)                      ATC Category:  Acute
      Provider: PRIMARY CARE GROUP                   Appt Type:  PCM
      Location: 23708                                Spec Type:
   Clinic Spec:                                      Provider Spec:
   Date Range: 03 Jul 2000 to 04 Jul 2000            Days of Week: M TU W TH F SA S
   Time Range: 0001 to 2400                          Duration: 30
=============================================================================
07 Aug 00 0700 MON  1030  PCM  1/0   30  PE  BPAD BPNPR




=============================== Select Slot #1 of 1 ===============================
Select (B)ook appt, (M)odify Appt or (Q)uit FILE APPOINTMENT: B//

==============================  End of Screen   ==============================
```

13. If you select the (B)ook appt action from the FILE APPOINTMENT action bar, the system displays the FILE APPOINTMENT screen and allows you to file the appointment (refer to Screen 3.4-8). The Workload Type may be edited for Count clinics. A booking clerk will need the security key SD WK LOAD to edit the Workload Type field.

If the Workload Type field defaults to Count for the selected schedule slot being worked from the Schedulable Entity file, you may modify the workload type to Non-Count. Non-Count clinics may not be edited.

When you have entered or edited the appropriate appointment data and elected to file the appointment, the system will file the appointment data along with the workload type for the booked appointment in the Patient Appointment file. The Schedulable Entity file remains unchanged.

The new field is bolded.

================================ **Screen 3.4-8**====================================

PATIENT APPOINTMENT: BLITON,JERALD   FILE APPOINTMENT

        MON 1030 07 AUG 00 PCM   1/0 30 PE BPAD
     No reminder notice will be sent. Hand-carry Radiology/Patient records.
      O/S Rec Loc:

       Clinic Message: NEW PTS ARRIVE 25 MINUTES EARLY
  Clinic/Appt Type Instructions: CALL 540-2313 TO CANCEL APPT
     Provider Message:
Provider/Appt Type Instructions:
     Arrival Message: 15 minutes
   Registration Comment:
  ===
       MEPRS Code: BAAA
     Workload Type: COUNT
   Requesting Service:
      Referred By:
  Send Reminder Notice: NO
  Appointment Comment:
  Reason for Appointment:

Ask for Help = HELP   Screen Exit = F10   File/Exit = DO

================================ **End of Screen** =================================

14. If you have the SD APPT STAND security key and select the (M)odify Appt action, the system redisplays the BOOKING SEARCH CRITERIA screen and prompts you to change the appointment type and add to or edit/delete detail codes previously linked to the schedule slot. If modifications are made to the schedule slot data, you must enter a change reason (refer to Screen 3.4-9). Once the appointment change reason has been entered, the system redisplays the action bar and allows you to book the appointment. If you elect to book the appointment, the system displays the File Appointment screen (Screen 3.4-8).

15. Once you have entered and filed the appointment data, the system will create an entry in the Patient Appointment file to include the workload type, duration and detail codes, linked to the appointment and the reason for those changes. The system then redisplays the PCM MTF BOOKING SEARCH CRITERIA screen and the prompt to view other appointments. If you do not wish to view other appointments, you may answer with a 'No" and return to the Health Care Finders Booking screen. The new fields are in bold.

=============================== **Screen 3.4-9**====================================

PCM MTF BOOKING SEARCH CRITERIA

     Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT   PLOC Phone: 234-5678
Detail Codes: ATC Category: ACUTE
Provider: PRIMARY CARE GROUP   Appt Type: PCM
    Location: 23708   Spec Type:
 Clinic Spec: Provider Spec:
 Date Range: 03 Jul 2000 to 04 Jul 2000   Days of Week: M TU W TH F SA S
Time Range: 0001 to 2400   **Duration**: 30

?--Select Slot #1 of 1-- ?----------
Select APPOINTMENT TYPE: EST EST   ESTABLISHED FOLLOW-UP   ACTIVE
 45
Select DETAIL CODE: ASTHMA   Asthma evaluation or education appointments
Select ANOTHER DETAIL CODE:
Appointment CHANGE REASON: Pt in need of help

============================== **End of Screen** ==============================

16. Once you have accepted or modified the current appointment type for the slot selected, the system will prompt you to enter/edit appointment detail codes linked to the selected appointment slot.

17. If you modify either the appointment type and/or detail codes, the system will prompt you to enter an Appointment Change Reason. This is a free-text field.

18. Once you file the appointment modifications, the system updates the appointment slot data in the Patient Appointment file accordingly and redisplays the PCM MTF BOOKING SEARCH CRITERIA screen and action bar (refer to Screen 3.4-4). The clerk may then book the appointment and will see screen 3.4-8. The Schedulable Entity file remains unchanged.

B.   Referral Enter/Edit

The Referral Enter/Edit option is used to enter or modify a referral/Consult for specialty care. None of the Consults requirements are changed with this project. The changes included here pertain to appointment searches and booking. The screens display the new Duration field. Use the following menu path.

 1. **MENU PATH: PAS=>M=>HMCP=>BHCF =>(R)eferral**

 2. As soon as you elect to enter a referral for specialty care, the system displays the REFERRAL ENTER/EDIT screen and allows you to enter the referral information (refer to Screen 3.4-10).

============================== **Screen 3.4-10** ==================================

MCP Referral: 20000000110   Referral Date/Time: 10 Feb 2000@1333
REFERRAL ENTER/EDIT
       Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
      Pat SSN: 278-55-5025   Sex/DOB/Age: M/01 Jan 1960/40Y
       Pat Cat: USA ACTIVE DUTY OFFICER   Home Zip: 23668
    Home Phone: 619 546 6121   Duty Phone: 619 535 7265
    Work Phone: 619 535 7265

         PCM: PRIMARY CARE GROUP   PCM Phone: 234-5678
==
     Referred by: POTTER,HARRY   Referral from: PRIMARY CARE CLINIC
        Priority: ROUTINE   # of Visits Requested: 1
 ATC Category: WELLNESS   Appt Type: Well
Clinic Specialty: PRIMARY CARE   **Duration: 30 ← (New)**
  Prov Specialty: Start Date: 10 Aug00
  Place of Care: PRIMARY CARE CLINIC   Stop Date: 09 Sep 00
    Provider: BRICE,ROBERT   Start Time: 0001
    Spec Type: Stop Time: 2400
     Location: Days of Week:
    Language: Prefer Gender:

============================== **End of Screen** ==================================

3. As part of Appointment Standardization Phase II, the system will allow you to set further the search criteria by modifying the duration for the appointment (refer to Screen 3.4-1) and/or linking up to three appointment detail codes to a specialty care referral request (refer to Screen 3.4-11). The Detail codes may be edited or modified.

============================== **Screen 3.4-11** ==================================

MCP Referral: 20000000110   Referral Date/Time: 10 Feb 2000@1333
REFERRAL ENTER/EDIT
      Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
     Pat SSN: 278-55-5025   Sex/DOB/Age: M/01 Jan 1960/40Y

==
Appointment Detail Code: ← (NEW FIELD)
PE
BPAD

Reason for Referral:

Provisional Diagnosis (ICD9):

Provisional Diagnosis (Free Text):

Referral Procedure:

============================== **End of Screen** ==================================

4. If you enter any appointment detail codes in the referral request, the system will use the detail codes along with the appointment type and duration if entered, when searching for available appointment slots.

5. Once you have filed the referral, you may elect to do a provider search or edit the referral.

6. It should be noted that if there are no available appointment slots for the appointment type and/or detail codes linked to the Referral entered, you may modify the Referral to edit or delete the Detail codes to find an available appointment slot. Then you may modify the appointment slot to reflect the actual care that will be rendered to the patient.

7. There are no changes to the screen for reviewing Consults and that screen is not displayed here.

C.   Referral Booking

The Referral Booking option is used to book an appointment for a patient to a specialty clinic. Booking clerks should note the new Detail Codes and Duration fields. Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>BHCF=>(R)eferral**

2. As soon as you elect to book a MCP referral, the system displays the Referral Summary screen and allows you to select the referral to book (refer to Screen 3.4-13). The new fields are bolded.

Note: Appointment slots that contain Slot Comments will have a tilde (~) to the left of the appointment slot. If a user wishes to view the Slot Comment, the cursor should be positioned to the left of the appointment slot and the F9 function key used to view the details of the appointment slot including the Slot Comment. (Refer to Section 3.4.2.2 P for details).

================================ **Screen 3.4-13** =================================

SINGLE PATIENT BOOKING

Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Place of Care: FAMILY PRACTICE/APPT ST   PLOC Phone:
 Detail Codes: BP BPAD   ATC Category: WELLNESS
   Provider: Appt Type:
   Location: Spec Type:
  Clinic Spec: Provider Spec:
  Date Range: 17 May 2001 to 16 Jun 2001   Days of Week: M TU W TH F SA SU
  Time Range: 0001 to 2400   **Duration: 30**
──
~ TUE 0900 25 Jul 00 WELL 1/0 30 PE BPAD   RICHARD,P
  TUE 0930 25 Jul 00 WELL 1/0 30 PE BPAD   RICHARD,P
~TUE 1000 25 Jul 00 WELL 1/0 30 PE BPAD   RICHARD,P
~TUE 1030 25 Jul 00 WELL 1/0 30 PE BPAD   RICHARD,P
  TUE 1100 25 Jul 00 WELL 1/0 30 PE BPAD   RICHARD,P
  TUE 1130 25 Jul 00 WELL 1/0 30 PE BPAD   RICHARD,P
+ TUE 1200 25 Jul 00 WELL 1/0 30 PE BPAD   RICHARD,P
══
Use SELECT key to select appointment to be booked
Press F9 to view additional appointment data

================================ **End of Screen** =================================

3. If you entered an appointment type but not any appointment detail codes and/or appointment duration, the system will search for and display all available appointment slots with the specified appointment type regardless of any appointment detail codes or appointment duration linked to the available appointment slots.

4. If you entered appointment type, slot duration, and up to three appointment detail codes in the referral, the system will then search for and display only those available appointment slots with the specified appointment type, slot duration and Detail codes. When Detail codes are used as search criteria, appointment slots will display only when they are an exact match of the detail codes entered in the referral or a subset of the search criteria entered.

5. Appointments selected may be modified as in PCM Booking. The appointment type, Detail codes, and Workload Type may be modified if the clerk has the necessary security keys (i.e. SD APPT STAND and SD WK LOAD). There are no changes to appointments linked to Consult orders.

6. Once you select an available appointment slot from the appointment pick list and elect to book the appointment, the system will display the FILE APPOINTMENT screen (refer to PCM BOOKING, Screens 3.4-8 and 3.4-9) and allow you to book the appointment. The appointment with the modified data will be stored in the Patient Appointment file. The Schedulable Entity file will remain unchanged.

D.   Non-Enrolled Booking

The Non-Enrolled Booking option is used to book a primary care appointment for a non-enrolled MCP patient. Booking clerks should note the new Detail Codes and Duration fields. Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>BHCF=(N)on-Enrolled**

2. If you elect to book a primary care appointment for a non-enrolled MCP patient by selecting the Non-Enrolled Booking action from the HCF Booking action bar, the system will display the NON-ENROLLEE BOOKING SEARCH CRITERIA screen and prompt you to select the appropriate search criteria (refer to Screen 3.4-14). New fields are bolded.

================================ **Screen 3.4-14** ==================================

```
                        NON-ENROLLEE BOOKING SEARCH CRITERIA
         Patient: BLITON,CINDERAL              FMP/SSN: 04/278-55-5025
     Place of Care:                         PLOC Phone:
     Detail Codes:                          ATC Category:
        Provider:                              Appt Type:
        Location:                              Spec Type:
      Clinic Spec:                          Provider Spec:
      Date Range: 17 May 2001 to 28 Jun 2001   Days of Week: M TU W TH F SA SU
      Time Range: 0001 to 2400                 Duration:
===============================================================================
* Access to Care Category
  Location
  Specialty
  Place of Care
  Provider
  Appointment Type
  Detail Codes
+ Duration
===============================================================================
Use SELECT key to select SEARCH CRITERIA
```

================================ **End of Screen** ==================================

3. As part of Appointment Standardization Phase II, Detail Codes have been added as booking search criteria. If you select Detail Codes from the list of search criteria, the system will prompt you to enter up to three detail codes.

4. Once you have entered up to three detail codes for the appointment search, the system will display those detail codes as search criteria in the header of the NON-ENROLLEE Booking Search Criteria screen.

5. As in PCM Booking and Referral Booking, the system will search for available appointments based on the search criteria entered. You may elect to search for available appointment slots by appointment type only and not limit the search by entering an appointment detail code and/or appointment duration. If so, then the system will search for and display all available appointment slots with the specified appointment type regardless of any appointment detail codes or appointment duration linked to the available appointment slots.

6. You may also narrow the appointment search by entering appointment type, slot duration and up to three appointment detail codes as secondary appointment search criteria. The system will then search for and display only those available appointment slots with the specified appointment type, slot duration and an exact match of the detail codes entered as search criteria (refer to Screen 3.4-5). As with all search criteria, the Detail codes for the

appointment slots must be exact matches or subsets to the Detail codes entered as search criteria.

7. The system will also allow you to search for available appointments by entering only detail codes as secondary search criteria. The system will then search for and display only those available appointment slots that are exact matches or subsets of the Detail codes entered as search criteria. regardless of appointment type or duration. Once you select an available appointment from the pick list and elect to book the appointment, the system will display the FILE APPOINTMENT screen (refer to PCM BOOKING, Screens 3.4-8 and 3.4-9) and allow you to book the appointment. It should be noted that you may modify the appointment data (i.e., appointment type, detail codes and appointment change reason) prior to booking the appointment. The appointment with the modified data will be stored in the Patient Appointment file. The Schedulable Entity file will remain unchanged.

E. Log Non-MTF Appointment

The Log Non-MTF Appointment option is used to enter appointment information to a civilian clinic into CHCS. This information may be useful for Tricare tracking purposes. Booking clerks should note the new Detail Codes field. Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>BHCF=>(L)og Non-MTF**

2. When you elect to (L)og Non-MTF Appointment, the system will display the NON-MTF APPOINTMENT LOG ENTER/EDIT screen (refer to Screen 3.4-15). You need the SD APPT STAND security key to link detail codes. The new field is in bold.

=============================== **Screen 3.4-15** ===============================

NON-MTF APPOINTMENT LOG ENTER/EDIT
Patient: BLITON,JERALD	FMP/SSN: 20/278-55-5025
Pat SSN: 278-55-5025	Sex/DOB/Age: M/01 Jan 1960/40
PatCat: USA ACTIVE DUTY OFFICER	Patient Type: MCP/ACTIVE DUTY
Home Zip: 23668	Duty Phone: 619 535 7265
Home Phone: 619 546 6121	Work Phone: 619 535 7265
PCM: PRIMARY CARE GROUP	PCM Phone: 234-5678
PLOC: PRIMARY CARE CLINIC - NO	Case Mgmt Prov:

===

    Appt Type: N-MTF
Appt Date/Time: 09 Aug00@1400
  Place of Care: TARPIN ASSOCIATES   PLOC Phone: (800) 234-1204
     Provider: TARPIN,DANIELE   Provider Spec: CARDIOLOGY
       MEPRS: BACA
  Detail Codes: ← (New Field)
     BP
     CHOL

MCP Referral #:
 Ref Date/Time:

Appointment Comment:
   Date/Time Logged: 17 May 2001@1347   Logged by: CLARK,KENT
    Cancel Date/Time: Canceled by:

=============================== **End of Screen** ===============================

3. As soon as you have entered the Non-MTF appointment data (including date/time, place of care, provider) and required referral information, the system will allow you to link appointment detail codes to the Non-MTF appointment.

4. As with all MCP Booking options, the system will allow you to enter/edit up to three appointment detail codes to link to a Non-MTF appointment being logged.

F.   Self-Referral Booking

The Self-Referral Booking option (SHCF) is new in the APS II project.

The Self-Referral Booking option is used to book a patient requested appointment with a specialty care provider in a specialty clinic that allows self-referrals without entering a MCP referral.

The Clinic Specialty in the option CPRO is cross-referenced to the MCP Specialty Type file. Appointments booked via the new option, (S)elf-Referral, will locate only those providers with specialties linked to the Clinic Specialty via the MCP Specialty Type file. Any changes or additions to the Clinic Specialty field may impact Consult tracking and booking. Booking clerks, Supervisors and DBA's should be aware that if appointments are not found during the use of (S)elf-Referral booking, that they should verify the provider's specialty, Clinic Specialty, and the MCP Provider Specialty Type in addition to other normal trouble shooting tools. DBA's, Supervisors and credentialing personnel should ensure:

- that all self-referral clinics have the Clinic Specialty field populated prior to usage
- that the MCP Specialty file is properly populated.
- that providers who will have appointments booked via Self-Referral booking have a valid specialty populated in the MCP Specialty Type file.

Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>SHCF**

2. A new option, SHCF Self-Referral Booking (menu name - CP SELF-REFERRAL BOOKING), has been added to the Health Care Finder Menu in MCP (refer to Screen 3.4-16). The Self-Referral action is also available as an Action Bar option in Health Care Finder Booking (BHCF).

================================= **Screen 3.4-16** =================================

```
AHCF   Appointment Order Processing
BHCF   Health Care Finder Booking
SHCF   Self-Referral Booking      ←--(New Menu)
EHCF   Enter Appointment Refusals
CHCF   Cancellation by Patient
OHCF   Output Products
RHCF   Health Care Finder Reports Menu
LHCF   Print Patient Address Label
EENR   Enrollment Enter/Edit

Select Health Care Finder Menu Option:
```

================================= **End of Screen** =================================

3. The Self-Referral Booking option allows you to book a patient requested appointment with a specialty care provider in a clinic that allows self-referrals without entering a MCP Referral. The specified clinic must have the Self-Referrals Allowed field in the Clinic Profile set to 'YES' in order to book an appointment using the Self-Referral Booking option and a clinic specialty listed in the clinic profile.

4. As soon as you select the Self-Referral Booking option, either from the Health Care Finder menu (refer to Screen 3.4-1) or from the main action bar in Health Care Finder Booking, the system displays the SELF-REFERRAL BOOKING SEARCH CRITERIA screen and action bar (refer to Screens 3.4-17a-b). A booking person may also do a DEERS check and access Demographics options such as Mini-Reg and assign PCM's (if assigned the security key CPZ HCF ENROLL).

============================== **Screen 3.4-17a** ================================

HEALTH CARE FINDER BOOKING

Patient: SCREE,DONNY M	DDS/FMP/SSN: 20/20/452-13-9866
Pat SSN: 456-47-6464	Sex/DOB/Age: M/29 Mar 1980/21Y
PatCat: USAF / AD	
Elig St/End: 29Mar1980-28Mar2001	CHCS MCP Status: ENROLLED
Last Elig Ck: 12Aug1998@154525	Enroll St/End: 01Aug1996-31Jul1999

Dir Care: Y   CHA: C   MED: N   ACV: E   Reg Code: 03   DMIS: 0050
PCM: BARRON,PROVIDER   Case Mgmt: No PCM Ph#: 234-5678
PCM PLOC: ADULT PRIMARY CARE   PCM Location: DIRECT CARE

?---

Sponsor: SCREE, DONNY JR	Spon Rank: MASTER SERGEANT
Spon PatCat: USAF ACTIVE DUTY	Duty Phone: 912-257-3588
Sponsor UIC: 0347 SUPS	DSN: 460-2434
Address: 4953 BER RABBIT CIR	
City: ATLANTA	Home Phone:
St: GA Zip:	Work Phone:

Reg Comment:
O/P Rec Room: OUTPATIENT RECORDS   Reg Updated: 29 Aug 1995@0851

?--

Select (S)elf-Referral Booking, (V)iew/Query DEERS, (D)emographics
    or (Q)uit: S//

============================== **End of Screen**   ================================

When you select (S)elf-Referral Booking, the following screen displays.

============================== **Screen 3.4-17b** ================================

SELF-REFERRAL BOOKING SEARCH CRITERIA

Patient: SCREE,DONNY M	FMP/SSN: 20/452-13-9866
Place of Care:	PLOC Phone:
Detail Codes:	ATC Category:
Provider:	Appt Type:
Location:	Spec Type:
Clinic Spec:	Provider Spec:
Date Range: 17 May 2001 to 28 Jun 2001	Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400	**Duration:**

?---

 * Access to Care Category
  Location
  Specialty
  Place of Care
  Provider
  Appointment Type
+ Detail Codes

?--

Use SELECT key to select SEARCH CRITERIA

============================== **End of Screen**   ================================

5. When booking an appointment to a non- Primary Care Manager in a specialty care clinic that allows self-referrals, you must enter Access to Care Category, Patient and Place of Care as primary search criteria. As soon as you accept the default to enter search criteria, the system will display a list of the primary and secondary search criteria in the middle window of the

SELF-REFERRAL BOOKING SEARCH CRITERIA screen (refer to Screen 3.4-18). New fields are bolded.

================================ **Screen 3.4-18** =================================

```
SELF-REFERRAL BOOKING SEARCH CRITERIA
     Patient: SCREE,DONNY M                    FMP/SSN: 20/452-13-9866
Place of Care:                              PLOC Phone:
Detail Codes:                               ATC Category:
     Provider:                                  Appt Type:
     Location:                                  Spec Type:
   Clinic Spec:                              Provider Spec:
 Date Range: 17 May 2001 to 28 Jun 2001     Days of Week: M TU W TH F SA SU
 Time Range: 0001 to 2400                   Duration:
===============================================================================
  * Access to Care Category
  * Patient
    Provider
  * Place of Care
  * Appointment Type
  * Detail Codes
  * Duration
  + Dates
=============== Access to Care Category, Patient and PLOC are required =========================
Select Appt Type:  WELL
Select DURATION:  30
Select DETAIL CODE:  HEAD
Select ANOTHER:
```

================================ **End of Screen** =================================

6. The system will first prompt you to enter ATC Category, PLOC, and Patient. Once you have entered the primary search criteria, CHCS will then prompt you to enter the secondary search criteria if any were selected.

7. After you have entered the appropriate search criteria and pressed 'RETURN' to continue, the system will redisplay the SELF-REFERRAL BOOKING SEARCH CRITERIA screen and action bar with the new search criteria displayed in the header (refer to Screen 3.4-19). New fields are bolded.

=============================== **Screen 3.4-19** ===================================

SELF-REFERRAL BOOKING SEARCH CRITERIA

Patient: BROWN,JOYCE	FMP/SSN: 20/430-36-2947
Place of Care: GENERAL MEDICINE	PLOC Phone:
Detail Codes: HEAD	ATC Category: WELLNESS
Provider:	Appt Type: WELL
Location:	Spec Type:
Clinic Spec:	Provider Spec:
Date Range: 07 Aug 2001 to 06 Sep 2001	Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400	**Duration: 30**

===

===
(C)hange the Search Criteria, Appt (S)earch, or (Q)uit: S//

=============================== **End of Screen** ===============================

8. If you select the Appt (S)earch action from the action bar, the system will search for and display all available appointments in the specified place of care that meet the search criteria entered (refer to Screen 3.4-20). New fields are in bold.

=============================== **Screen 3.4-20** ===================================

SELF-REFERRAL BOOKING SEARCH CRITERIA

Patient: BROWN,JOYCE	FMP/SSN: 20/430-36-2947
Place of Care: GENERAL MEDICINE	PLOC Phone:
Detail Codes: HEAD	ATC Category: WELLNESS
Provider:	Appt Type: WELL
Location:	Spec Type:
Clinic Spec:	Provider Spec:
Date Range: 07 Aug 2001 to 06 Sep 2001	Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400	**Duration: 30**

===
```
 *  MON 0900 07 Aug 00 WELL  10/0  30   HEAD                          CRAWFORD,JOAN
    MON 1400 07 Aug 00 WELL  10/5  30   HEAD                          ALEXANDER,NEIL
    WED 0800 09 Aug 00 WELL  10/5  30   HEAD                          CAMPBELL,ANN
```
===
Use SELECT key to select appointment(s) to be booked
Press F9 to view additional appointment data

=============================== **End of Screen** ===============================

9. As in PCM Booking and Referral Booking, the system will search for available appointments based on the search criteria entered. You may elect to search for available appointment slots by appointment type only and not limit the search by entering appointment detail codes and/or appointment duration. If so, then the system will search for and display all available appointment slots with the specified appointment type regardless of any appointment detail codes or appointment duration linked to the available appointment slots.

10. You may also narrow the appointment search by entering appointment type, slot duration and up to three appointment detail codes as secondary appointment search criteria. The system will then search for and display only those available appointment slots with the

specified appointment type, slot duration and an exact match of the detail codes entered or a subset of the detail codes entered as search criteria.

11. The system will also allow you to search for available appointments by entering only detail codes as secondary search criteria. The system will then search for and display only those available appointment slots with the specified detail codes linked to them, regardless of appointment type or duration.

12. Once you have selected an appointment slot, the system will redisplay the SELF-REFERRAL   BOOKING screen and allow you to book the appointment selected, modify the appointment, or quit (refer to Screen 3.4-21). New fields are bolded.

```
=============================== Screen 3.4-21 ================================

                     SELF-REFERRAL BOOKING SEARCH CRITERIA
       Patient: BROWN,JOYCE                       FMP/SSN:  30/430-36-2947
Place of Care:  GENERAL MEDICINE                  PLOC Phone:
Detail Codes: HEAD                                ATC Category:  WELLNESS
   Provider:                                      Appt Type:   WELL
   Location:                                      Spec Type:
 Clinic Spec:  Family Practice                    Provider Spec:
 Date Range: 07 Aug 2001 to 06 Sep 2001           Days of Week: M TU W TH F SA SU
 Time Range: 0001 to 2400                         Duration:  30
================================================================================
 *  MON 0900 07 Aug 00 WELL  10/0  30  HEAD                     CRAWFORD,JOAN


=============================== Select Slot #1 of 1 ==================================
Select (B)ook Appt, (M)odify Appt or (Q)uit FILE APPOINTMENT: B//

=============================== End of Screen  ===============================
```

13. If you select the (M)odify Appt action, the system will allow you to change the appointment type and/or the detail codes linked to the selected appointment slot. If you have the SD APPT STAND security key and make any changes to the appointment type and/or the detail codes, the system will require you to enter a reason for the change (refer to PCM Booking, Screen 3.4-9).

14. For self-referral reporting purposes, once the appointment has been successfully booked, CHCS will automatically generate the referral in the MCP Referral file. The Clinic Specialty entered in the Clinic Profile for the specified clinic determines which providers' schedule slots will be displayed. If the specified clinic has multiple clinic specialties entered in the Clinic Specialty field in the Clinic Profile, the system will prompt you to select the appropriate Clinic Specialty to link to the Self-Referral (refer to Screen 3.4-22). The minimum criteria to select is Place of Care. New screens are in bold.

15. If you select the (B)ook Appt action, the system will display the FILE APPOINTMENT screen (refer to PCM BOOKING, Screens 3.4-8) and allow you to book the appointment.

=============================== **Screen 3.4-22** ==================================

SELF-REFERRAL BOOKING SEARCH CRITERIA
      Patient: BROWN,JOYCE   FMP/SSN: 30/430-36-2947
Place of Care: GENERAL MEDICINE   PLOC Phone:
Detail Codes: HEAD   ATC Category: WELLNESS
   Provider: Appt Type: WELL
   Location: Spec Type:
 Clinic Spec: Provider Spec:
 Date Range: 07 Aug 2001 to 06 Sep 2001   Days of Week: M TU W TH F SA SU
 Time Range: 0001 to 2400   **Duration: 30**
==
 Clinic Specialty:

     CRITICAL CARE
     GENERAL MEDICINE
   * OCCUPATIONAL HEALTH
==
Use SELECT key to select the Clinic Specialty to link to the Self-Referral

=============================== **End of Screen** ==================================

16. Once you have selected the appropriate Clinic Specialty and pressed 'RETURN' to continue, the system will display the FILE APPOINTMENT screen (refer to PCM BOOKING, Screen 3.4-8) and allow you to book the appointment.

G.   Wait List Request

The Wait List Request option is used to allow the entering/editing of wait list request data. Booking clerks should note the new Detail Codes field. Use the following menu path.

1. **MENU PATH: PAS=>M=>CDSK=>WLR**

2. When you elect to add or edit a Wait List Request for a specified clinic or a specified clinic and provider, the system will display the Wait List Add screen and allow you to enter/edit the appropriate Wait List Request data (refer to Screen 3.4-23). Note that the screen layout has changed somewhat. New fields are in bold.

=============================== **Screen 3.4-23** ==================================

PATIENT APPOINTMENT: BLITON,JERALD   SD WAIT LIST ADD

          PATIENT: BLITON,JERALD   FMP/SSN: 20/278-55-5025
     HOME PHONE: 619 546 6121   WORK PHONE: 619 535 7265
      STREET: 4235 CANDY CANE LANE   ZIP CODE: 23668
        CITY: HAMPTON   STATE: VIRGINIA
==
         CLINIC: PRIMARY CARE CLINIC   APPT TYPE: WELL
        PROVIDER: POTTER,HARRY   **DURATION: 30**
DETAIL CODES :
         PE
         BPAD

      WAIT LIST PRIORITY: 2
 REQUESTED START TIME: 0001   REQUESTED STOP TIME: 2400
       DAYS OF WEEK: M TU W TH F

```
    WAIT LIST TARGET DATE: 05 Jul 2000
          WAIT LIST COMMENT:
 REASON FOR APPOINTMENT:
```

============================== **End of Screen** ===============================

3. You will be able to enter slot duration and appointment detail codes when entering a Wait List Request.

4. When the newly entered/edited Wait List Request is processed, the system will use the appointment detail codes to search for available appointments (refer to the Wait List Processing subsection below).

H.   Wait List Processing

The Wait List Processing option is used to enter wait list data and to process wait list requests. Booking clerks should note the new Detail Codes and Duration fields. Use the following menu path.

1. **MENU PATH: PAS=>M=>CDSK=>NOT=>WNOT**

2. When you elect to book a Wait List Request, the system displays the WAIT LIST PROCESSING SEARCH CRITERIA screen and action bar.

3. Once you have selected the appropriate wait list request to process, (search criteria; e.g., Clinic is required), the system will prompt you for the Wait List Sort Criteria (i.e., priority, date entered, target date, or patient).

4. As soon as the sort criteria have been selected, the system will search for all Wait List Requests based on the search criteria entered.

5. The system displays all Wait List Requests for the criteria entered in the middle window of the Wait List Requests by the [sort criteria selected] screen and action bar.

6. The system allows you to select either (A)ll or (I)ndividual Patients to process. The system also allows you to select the (P)rint Hardcopy action to select and print a hardcopy of the Wait List Requests displayed in the middle window of the WAIT LIST PROCESSING SEARCH CRITERIA screen .

7. Once you have selected the Wait List Request/s to process, the system displays the NOTIFICATION PROCESSING screen for the first Wait List Request to process (refer to Screen 3.4-24).

=============================== **Screen 3.4-24** =================================

NOTIFICATION PROCESSING
DIVISION: NAVY INPATIENT DIVISION
PATIENT: SALEHI,DARIUSH   FMP/SSN: 20/123-54-6789 AGE: 41
SPONSOR: SALEHI,DARIUSH   DUTY PHONE:

HOME PHONE: WORK PHONE:
WAIT LIST REQUEST: 09 Dec 99 PRO   RCC
TIME RANGE: 0001 TO 2400   DAYS of WEEK: M TU W TH F
WAIT LIST COMMENT: test
REASON FOR APPOINTMENT: test

PRIORITY: 2   ZIP CODE: 92128
  CONTACT ATTEMPTS   DATE@TIME   (Yes/No)
❓
  CANAS,RAM   27 Sep 2001@1155   Yes

❓
Select (T)elephone/No Mailer, (D)elete,
     (N)ext Patient, or (Q)uit Processing: N//

=============================== **End of Screen** =================================

8. The NOTIFICATION PROCESSING screen will be modified to include the duration and detail codes for the appointment being requested in the WAIT LIST REQUEST field (refer to Screen 3.4-1, WAIT LIST REQUEST field).

9. The system displays a phone number to provide you the capability to contact the patient by telephone in order to book the Wait List Request or to book the Wait List Request and generate a mailer notifying the patient of the Pending Appointment. Please note that the Wait List Mailer will not include any detail codes linked to the Pending Appointment.

10. Once you have elected to telephone the patient or generate a mailer, the system displays the WAIT LIST BOOKING SEARCH CRITERIA screen and action bar (refer to Screen 3.4-25). New fields are in bold.

=============================== **Screen 3.4-25** =================================

WAIT LIST BOOKING SEARCH CRITERIA
Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Clinic: PRIMARY CARE CLINIC   ATC Category: WELLNESS
Clinic Phone: 234-0987   Appt Type: WELL
Provider: POTTER,HARRY   **Duration: 30**
Detail Codes: PE BPAD   Srv Type:
Time Range: Dates: 07 Aug 00 to 06 Sept 00   Days of Week: M TU W TH F
===
 Wait List Comment   :
 Wait List Priority   : 2
 Wait List Target Date : 05 Jul 00
 Wait List Entry Date : 05 Jul 2000@1118
 Reason for appointment:
  ===
Select (C)hange Search Criteria, (S)ingle Patient, (B)rowse, (T)el-Consult, or (Q)uit: S// C

=============================== **End of Screen** =================================

11. If you select the (S)ingle Patient action from the WAIT LIST BOOKING SEARCH CRITERIA action bar, the system will then search for and display all available appointments that meet the Wait List Booking search criteria on the SINGLE PATIENT BOOKING screen (refer to Referral Booking, Screen 3.4-13).

12. If you select the (B)rowse action from the WAIT LIST BOOKING SEARCH CRITERIA action bar, the system will allow you to browse a specified provider's appointment schedule for a date specified.

13. If you select the (T)el-Consults action from the WAIT LIST BOOKING SEARCH CRITERIA action bar, the system will allow you to enter a telephone consult for the specified patient without leaving the Wait List Processing option. It should be noted that Telephone Consults will not be modified to include appointment detail codes as part of Appointment Standardization, Phase II.

14. If you select the (C)hange Search Criteria action, the system displays the Wait List Booking search criteria in the middle window of the WAIT LIST BOOKING SEARCH CRITERIA screen and allows you to select the Wait List Booking search criteria to be modified (refer to Screen 3.4-26). New fields are in bold.

================================= **Screen 3.4-26** =================================

                              WAIT LIST BOOKING SEARCH CRITERIA
Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Clinic: PRIMARY CARE CLINIC   ATC Category: WELLNESS
Clinic Phone: 234-0987   Appt Type: WELL
Provider: POTTER,HARRY   **Duration: 30**
Detail Codes: PE BPAD   Srv Type:
Time Range: Dates: 07 Aug 00 to 06 Sept 00   Days of Week: M TU W TH F
==
  Access to Care Category
  Provider
  Clinic
  Appointment Type
  Duration   ←-------**New Criteria**
  Detail Codes ←------- «   «
  Dates
  Time Range
  Days of Week
  Service Type
=============== Access to Care Category, Appt Type, Patient and Clinic are required ================
Use SELECT key to select SEARCH CRITERIA to be changed

=============================== **End of Screen**   ===============================

15. The system will now allow you, if you have the SD APPT STAND security key, to select DURATION and DETAIL CODES as secondary Wait List Booking search criteria.

16. Once you have selected the search criteria to be modified, the system will prompt you to enter the new search criteria via the BOOKING SEARCH CRITERIA screen and action bar.

I.   Automatic Waitlist Processing

Currently, CHCS provides the capability to automatically book appointments from the Wait List by setting the AUTOMATIC WAIT LIST PROCESSING field in the Clinic Profile to 'YES'. During schedule creation if the AUTOMATIC WAIT LIST PROCESSING field is set to 'YES', the (W)AIT List Schedules action is displayed. If selected, the newly created schedule is put into a WAIT status while TASK MANAGER triggers a background job that automatically books the appointments based on provider, clinic, appointment type, duration, detail codes (if any) and target date entered in the Wait List Request.

As part of Appointment Standardization Phase II, you may enter up to three appointment detail codes when entering a Wait List Request. The current Automatic Wait List Processing functionality will be modified to adhere to the following business rules:

1. The appointment type and duration in the Wait List Request being processed must match the appointment type and duration of the schedule slot.

2. If there are any appointment detail codes linked to the Wait List Request being processed , then the appointment detail codes linked to a Waited Schedule Slot must match exactly with those linked to the Wait List Request and cannot be a subset of the appointment's detail code entered in the Wait List Request.

J.   Browse

Booking clerks should note the new Detail Codes and Duration fields. The Browse option is used to join, split, book and overbook appointments. Many of the Browse features are unchanged. Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>BHCF**

2. The Browse action may be accessed from any HCF Booking Search Criteria screen. It allows you to search for and display a specified provider's schedule for a specified date (refer to Screen 3.4-27). New fields are in bold.

=============================== **Screen 3.4-27** ===============================

PCM MTF BOOKING SEARCH CRITERIA
Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT   PLOC Phone: 234-5678
Detail Codes:**(New Field)**   ATC Category: ACUTE
Provider: PRIMARY CARE GROUP   Appt Type:
   Location: 23708   Spec Type:
 Clinic Spec: Provider Spec:
 Date Range: 03 Jul 2000 to 04 Jul 2000   Days of Week: M TU W TH F SA S
 Time Range: 0001 to 2400   **Duration**:
==
 Patient Home Phone: 619 546 6121   Patient Duty Phone: 619 535 7265

==
Select (C)hange Search Criteria, Appt (S)earch, Appt (R)efusal, (B)rowse,
    (T)el-Consult, or (Q)uit: C// B

=============================== **End of Screen** ===============================

3. When you elect to browse a specified provider's schedule and select the (B)rowse option, the
    system displays the [HCF Booking option] SINGLE PATIENT BROWSE SEARCH
    CRITERIA screen (refer to Screen 3.4-28).

=============================== **Screen 3.4-28** ===============================

PCM MTF SINGLE PATIENT BROWSE SEARCH CRITERIA
Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC
POC Phone: 234-5678
Provider: POTTER,HARRY   Date: 04 Aug 2000
?---

?---
Select (C)hange Search Criteria, (S)earch Schedule, or (Q)uit BROWSE: C// S

=============================== **End of Screen** ===============================

4. The system displays the current search criteria in the header of the [HCF Booking option]
    SINGLE PATIENT BROWSE SEARCH CRITERIA screen and action bar. The system
    allows you to change the current search criteria for provider and date only by selecting the
    (C)hange Search Criteria. You may search for the current provider's schedule for the current
    date specified by selecting the (S)earch Schedule, or quit Browse by selecting (Q)uit
    BROWSE.

5. If you select the (C)hange Search Criteria action, the system redisplays the [HCF Booking
    option] SINGLE PATIENT BROWSE SEARCH CRITERIA screen with the search criteria
    Provider and Date displayed in the middle window. The system allows you to select the
    criteria to change and then prompts you to enter the new criteria.

6. As soon you have entered the new criteria and pressed 'RETURN' to continue, the system redisplays the [HCF Booking option] SINGLE PATIENT BROWSE SEARCH CRITERIA screen with the new search criteria displayed in the header.

7. If you select the (S)earch Schedule action, the system searches for and displays on the [HCF Booking option] SINGLE PATIENT BROWSE screen, and the selected provider's schedule for the date specified displays in the middle window (refer to Screen 3.4-29).

Note: Appointment slots that contain Slot Comments will have a tilde (~) to the left of the appointment slot. If a user wishes to view the Slot Comment, the cursor should be positioned to the left of the appointment slot and the F9 function key used to view the details of the appointment slot including the Slot Comment. (Refer to Section 3.4.2.2 P for details).

================================ **Screen 3.4-29** ================================

```
                          PCM MTF SINGLE PATIENT BROWSE
Patient: BLITON,JERALD                                      FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC
POC Phone: 234-5678
Provider: POTTER,HARRY                                      Date: 04 Aug 2000
?----------------------------------------------------------------------------------------------------------------------
   FRI 0700 04 Aug 00 WELL  1/1   30  PE BPAD              BOOKED
   FRI 0730 04 Aug 00 WELL  1/0   30  PE BPAD              OPEN
  ~FRI 0800 04 Aug 00 WELL  1/0   30  PE BPAD               OPEN
  ~FRI 0830 04 Aug 00 WELL  1/0   30  PE BPAD               OPEN
  ~FRI 0900 04 Aug 00 WELL  1/0   30  PE BPAD               OPEN
  ~FRI 0930 04 Aug 00 WELL  1/1   30  PE BPAD               BOOKED
   FRI 1000 04 Aug 00 WELL  1/1   30  PE BPAD              BOOKED
   FRI 1030 04 Aug 00 WELL  1/0   30  PE BPAD              OPEN
   FRI 1100 04 Aug 00 WELL  1/1   30  PE BPAD              BOOKED
+  FRI 1130 04 Aug 00 WELL  1/0   30  PE BPAD              HOLD
?----------------------------------------------------------------------------------------------------------------------
Select one slot to Split, Book, or Overbook.
Select multiple consecutive slots to Join.
Press F9 to view additional appointment data
```

================================ **End of Screen** ================================

8. The system displays all schedule slots for that day regardless of the schedule slot status (e.g., open, booked, cancelled, wait, hold). The system allows you to:

    *   Select one slot to Split, Book, or Overbook
    *   Select multiple consecutive slots to Join
    *   Press F9 to view additional appointment data.

9. As part of Appointment Standardization, Phase II, Detail Codes linked to schedule slots will be added to the schedule slot display list.

10. Whether you select one or multiple consecutive slots, the system will redisplay the [HCF Booking option] SINGLE PATIENT BROWSE screen with either the (J)oin or (S)plit action displayed on the action bar depending on whether you selected one or more slots to modify (refer to Screen 3.4-30).

================================= **Screen 3.4-30** =================================

PCM MTF SINGLE PATIENT BROWSE

Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Place of Care PRIMARY CARE CLINIC
POC Phone: 234-5678
Provider: POTTER,HARRY   Date: 04 Aug 2000
?---
  * FRI 0700 04 Aug 00 WELL 1/1 30 PE BPAD   BOOKED
  * FRI 0730 04 Aug 00 WELL 1/0 30 PE BPAD   OPEN
 ~FRI 0800 04 Aug 00 WELL 1/0 30 PE BPAD   OPEN
  ~ FRI 0830 04 Aug 00 WELL 1/0 30 PE BPAD   OPEN
   FRI 0900 04 Aug 00 WELL 1/0 30 PE BPAD   OPEN
   FRI 0930 04 Aug 00 WELL 1/1 30 PE BPAD   BOOKED
   FRI 1000 04 Aug 00 WELL 1/1 30 PE BPAD   BOOKED
   FRI 1030 04 Aug 00 WELL 1/0 30 PE BPAD   OPEN
   FRI 1100 04 Aug 00 WELL 1/1 30 PE BPAD   BOOKED
+ FRI 1130 04 Aug 00 WELL 1/0 30 PE BPAD   HOLD
 --**?**
Select (J)oin, (V)iew, or (Q)uit:

================================ **End of Screen** ================================

11. If multiple consecutive slots are selected and you select the (J)oin action, the system will display the SINGLE PATIENT BROWSE – CHANGE screen (refer to Screen 3.4-31) and allow you to enter the new schedule slot data for the newly joined slot.

12. If a single slot is selected and you select the (S)plit action, the system will display the SINGLE PATIENT BROWSE – CHANGE screen (refer to Screen 3.4-31) and allow you to enter the new schedule slot data for the two newly split consecutive schedule slots. New fields are in bold.

=============================== **Screen 3.4-31** =================================

APPOINTMENT SLOTS: 1   SINGLE PATIENT BROWSE - CHANGE

FRI 0700 04 Aug 00 NEW   1/0   30 PE BPAD   OPEN

Clinic: PRIMARY CARE CLINIC - NO
Provider: POTTER,HARRY
Division: NAVY OUTPATIENT DIVISION
Booked appointments:
Maximum overbooks allowed: 0
Day of Week: FRI
Appointment Slot Status: OPEN

Appointment Type: WELL
Duration: 45 minutes
Detail Codes:
BPAD
STRESS

Number of patients: 1
Appointment SLOT Comment:

Appointment Change Reason: Appointment Type/Detail value not appropriate

?
File/exit   Abort   Edit
File changes and exit.

=============================== **End of Screen** =================================

13. When joining two consecutive slots, the system allows those who hold the SD APPT
    STAND security key to:

    - Modify the appointment type
    - Modify the slot duration, not to exceed the total # of minutes of the all slots selected
      to be joined.
    - Add/Edit Detail Codes linked to the slots being joined
    - Change # of patients for the newly joined slot
    - Enter/Edit Appointment Comment
    - Enter reason for change of appointment type/detail codes, if modified.

14. When splitting a schedule slot into two new consecutive schedule slots, the system will
    display the SINGLE PATIENT BROWSE – CHANGE screen twice and allow you to enter
    the new schedule slot data for each new schedule slot.

15. When you have entered and filed the appropriate schedule slot data, the system redisplays
    the [HCF Booking option] SINGLE PATIENT BROWSE screen and action bar with the
    newly joined slot or the new split slots displayed in the middle window (refer to Screen
    3.4-32).

```
================================ Screen 3.4-32 ==================================

                        PCM MTF SINGLE PATIENT BROWSE
Patient: BLITON,JERALD                              FMP/SSN: 20/278-55-5025
Place of Care PRIMARY CARE CLINIC
POC Phone: 234-5678
Provider: POTTER,HARRY                              Date: 04 Aug 2000
?------------------------------------------------------------------------------
  *  FRI 0700 04 Aug 00 WELL  1/0  60 STRESS BPAD        OPEN
     FRI 0800 04 Aug 00 WELL  1/0  30 PE BPAD            OPEN
  ~  FRI 0830 04 Aug 00 WELL  1/0  30 PE BPAD            OPEN
  ~  FRI 0900 04 Aug 00 WELL  1/0  30 PE BPAD            OPEN
     FRI 0930 04 Aug 00 WELL  1/1  30 PE BPAD            BOOKED
     FRI 1000 04 Aug 00 WELL  1/1  30 PE BPAD            BOOKED
     FRI 1030 04 Aug 00 WELL  1/0  30 PE BPAD            OPEN
     FRI 1100 04 Aug 00 WELL  1/1  30 PE BPAD            BOOKED
  +  FRI 1130 04 Aug 00 WELL  1/0  30 PE BPAD            HOLD
?------------------------------------------------------------------------------
Select  (S)plit, (B)ook, (V)iew, or (Q)uit:


============================== End of Screen ==============================
```

16. The system automatically selects the newly joined slot or the new split slots for booking and updates the action bar accordingly (i.e., one slot selected, (S)plit action displayed; two slots selected, (J)oin action displayed).

17. If you select the (B)ook action, the system displays the FILE APPOINTMENT screen and allows you to book the selected appointment/s or modify the selected schedule slot data (refer to PCM Booking, Screen 3.4-7 for more detail).

K. Unscheduled Visits

Booking clerks should note the new Duration field in Unscheduled Visits.

MENU PATH: PAS=>M=>CDSK=>USV

1. The Front Desk Clerk tasked to enter Unscheduled Visits on CHCS must have the new SD WK LOAD security key to modify the Workload Type field defaulted from the appropriate Clinic/Provider Profile for the Appointment Type selected for the Unscheduled Visit.

2. As soon as an authorized front desk clerk selects the Unscheduled Visits option and enters the appropriate Walk-In Search Criteria (Patient, Clinic, Appointment Type), the system displays the WALK-IN SEARCH CRITERIA screen for the Walk-In (refer to Screen 33a). The new field is in bold.

=============================== **Screen 3.4-33a** ================================

WALK-IN SEARCH CRITERIA

Patient: BLITON,CALVIN   FMP/SSN: 10/278-55-5025
Clinic: PRIMARY CARE CLI   ATC Category: ACUTE
Clinic Phone: 234-5678   Appt Type: PCM
Provider: POTTER,HARRY SD   Srv Type:
Time Range: 1059 to 1059   **Duration:**
Dates: 08 Feb 2001 to 08 Feb 2001   Days of Week:
?==

==
?OK to file WALK-IN? Yes//
Select MEPRS CODE: BHAA//   PRIMARY CARE CLINICS
BHAA CkIn 1100
Workload Type: **COUNT//**

Appointment Comment: |

=============================== **End of Screen** ================================

3. If the Clinic Type field in the Clinic Profile is set to Non-Count for the Clinic linked to the Walk-In, the system will automatically default the Workload Type field on the WALK-IN SEARCH CRITERIA screen to Non-Count for the Walk-In being entered and make the field non-editable.

4. If the Clinic Type field in the Clinic Profile is set to Count for the Clinic linked to the Walk-In, the system will automatically default the Workload Type field on the WALK-IN SEARCH CRITERIA screen to the current Workload Type for the selected Appointment Type from the appropriate Clinic Profile and allow the authorized Front Desk Clerk to modify the Workload Type as appropriate.

5. When the authorized Front Desk Clerk has entered or edited the appropriate Walk-In appointment data and files the appointment, the system will file the appointment data along with the Workload type for the Walk-In in the Patient Appointment file.

6. Detail codes cannot be added or edited via the USV option (Walk-in)

L.   Individual Patient Check-In

Authorized booking clerks need to have the new SD WK LOAD security key to modify the Workload Type field, if necessary.

1. **MENU PATH: PAS=>M=>CDSK=>IPC**

2. The Front Desk Clerk tasked to enter 'check patients in' for scheduled appointments on CHCS must have the new SD WK LOAD security key to modify the Workload Type field defaulted from the patient appointment record in the Patient Appointment file for the

scheduled patient appointment. Each MTF should carefully screen the users who will be assigned this security key.

3. As soon as an authorized Front Desk Clerk selects the Individual patient Check-In option and enters the appropriate Search Criteria (Clinic or Patient), the system displays the INDIVIDUAL PATIENT CHECK IN screen and displays a list of all pending appointments that meet the search criteria entered. The Front Desk Clerk may then select the individual patient appointments to check-in (refer to Screen 3-33b). The new field is in bold.

```
================================= Screen 3.4-33b =================================

                    INDIVIDUAL PATIENT CHECK-IN
Patient:                                      FMP/SSN:
Clinic: CARDIOLOGY JC/N-IN                     Appt Type:
Provider:                                     Service:
Time Range: 0001 to 2400
Date: 09 Feb 2001                             Day of Week: FRIDAY
?================================================================
 *  0851  BLITON,CALVIN  10/5025 NEW  OUT   CRAWFORD          Pending




?================================================================
OK to file ? Yes//
Select MEPRS CODE: BHAA//        PRIMARY CARE CLINICS
BHAA CkIn 1100
Workload Type:  COUNT
Select PROVIDER: CRAWFORD,JACQUI//   CRAWFORD,JACQUI          441-27-7242
     OK? YES//

================================ End of Screen  ================================
```

4. As soon as the authorized Front Desk Clerk selects a pending appointment to check-in and presses the RETURN key to continue, the system will display the "OK to file? Yes//" prompt.

5. If the authorized Front Desk Clerk accepts the default, the system will allow the authorized Front Desk Clerk to modify the MEPRS Code, Workload Type, and Provider fields linked to the selected scheduled appointment.

6. If the Clinic Type field in the Clinic Profile is set to Non-Count for the Clinic linked to the selected appointment, the system will automatically default the Workload Type field on the INDIVIDUAL PATIENT CHECK IN screen to Non-Count for the appointment selected and make the field non-editable.

7. If the Clinic Type field in the Clinic Profile is set to Count for the Clinic linked to the selected appointment, the system will automatically default the Workload Type field on the INDIVIDUAL PATIENT CHECK IN screen to the current Workload Type for the selected

patient appointment record in the Patient Appointment file and allow the Front Desk Clerk to modify the Workload Type as appropriate provided they hold the new security key SD WK LOAD.

8. As soon as the authorized Front Desk Clerk modifies or returns through the MEPRS Code, Workload Type, and/or Provider fields, the system will change the appointment status from Pending to Kept and store the updated appointment data, including the Workload Type, in the Patient Appointment file.

M.   End of Day Processing

Authorized Clerks will require the new SD APPT STAND security key to modify appointment detail codes and the SD WK LOAD security key to modify workload types.

1. **MENU PATH: PAS=>M=>CDSK=>EOD**

2. The authorized Clerk tasked to perform End of Day Processing on CHCS must have the new SD APPT STAND security key to modify the Appt Detail Codes, appointment type, and duration linked to a patient appointment and the SD WK LOAD security key to modify the Workload Type field defaulted from the patient appointment record in the Patient Appointment file.

3. As soon as the authorized Front Desk Clerk selects the End of Day Processing option, enters the appropriate Search Criteria (Clinic or Patient), and elects to search for appointments, the system displays the END OF DAY PROCESSING screen with a list of those appointments that meet the search criteria entered. The Front Desk Clerk may then select individual patient appointments to process.

4. Once the authorized Front Desk Clerk selects the appropriate appointments to process and presses the RETURN key to continue, the system will display the appointment data for the first appointment selected and allow the Front Desk Clerk to modify the appointment data displayed on the END OF DAY PROCESSING screen (refer to Screen 3-33c). New fields are in bold.

```
============================== Screen 3.4-33c ================================

END-OF-DAY PROCESSING                         PATIENT APPT DATA
                    Personal Data - Privacy Act of 1974
Patient: BLITON,CALVIN                        FMP/SSN: 10/278-55-5025
----------------------------------------------------------------------------------------------------------
   Appt Date/Time: 09 Feb 2001@0851           Appt Status: KEPT
          Clinic: PRIMARY CARE                MEPRS Code: BAAA
        Provider: CRAWFORD,JACQUI             Appt Type: ROU
Secondary Provider:                           Workload Type: COUNT (New)
      Referred By:                            Request Svc:
      Checked-In: 09 Feb 2001@0912
 Appt Detail Codes: (New)
          CHOL



   Appt Comment:
 Reason for Appt:

   Cancelled By:
Date/Time Cancelled?
_____
File/exit   Abort   Edit
File changes and exit.


============================== End of Screen ================================
```

5. If the Clinic Type field in the Clinic Profile is set to Non-Count for the Clinic linked to the appointment, the system will automatically default the Workload Type field on the END OF DAY PROCESSING screen to Non-Count for the appointment being processed and make the field non-editable.

6. If the Clinic Type field in the Clinic Profile is set to Count for the Clinic linked to the appointment, the system will automatically default the Workload Type field on the END OF DAY PROCESSING screen to the current Workload Type for the selected patient appointment record in the Patient Appointment file and allow the Front Desk Clerk to modify the Workload Type as appropriate.

7. Please note that with the release of Appointment Standardization Phase II, an authorized Front Desk Clerk will be able to modify not only the Workload Type field but also the Appt Detail Codes for each medical clinic appointment using the End of Day Processing option.

8. When the authorized Front Desk Clerk files the updated appointment data, the system will file the appointment data along with the Workload type in the Patient Appointment file only.

N.   Cancel By Patient

Each patient appointment displayed in the middle window will now include the appointment duration and up to 3 appointment detail codes, if any, along with day, date and time of the appointment, appointment type, clinic abbreviation and/or provider.

The Cancel By Patient option is used to enter data when a patient cancels a pending appointment. Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>CHCF**

2. When you elect to Cancel/Reschedule a pending patient appointment using the Cancel By Patient option, the system displays the CANCELLATION BY PATIENT SEARCH CRITERIA screen and action bar. When you select the (C)hange Search Criteria action, the system displays the search criteria in the middle window of the CANCELLATION BY PATIENT SEARCH CRITERIA screen. The system then allows you to select and enter the appropriate search criteria for the Cancel By Patient pending appointment search (refer to Screen 3.4-34).

================================= **Screen 3.4-34** =================================

```
                       CANCELLATION BY PATIENT SEARCH CRITERIA
Patient:                                                       FMP/SSN:
Clinic:                                                    Clinic Phone:
Provider:                                                  ATC Category:
Detail Codes:                                                 Appt Type:
Time Range: 1454 to 1454                                       Duration:
Dates:                                                         Srv Type:
Days of Week:

========================================================================
  Patient
  Place of Care
  Provider
  Time Range
  Dates
  Appointment Type
  Default Search Criteria
==========================Clinic and Patient are required ==========================
Use SELECT key to select SEARCH CRITERIA to be changed
```

================================ **End of Screen** ================================

3. As part of Appointment Standardization, Phase II, you may select appointment type, duration and detail codes as secondary search criteria in order to narrow the search for pending appointments to be cancelled/rescheduled.

4. Once you have selected the search criteria to be modified, the system will prompt you to enter the new search criteria.

5. As soon as the new criteria has been entered and you have pressed 'RETURN' to continue, the system will search for and display all pending appointments that meet the search criteria entered in the middle window of the CANCEL/RESCHEDULE PATIENT APPOINTMENTS screen (refer to Screen 3.4-35).

================================= **Screen 3.4-35** =================================

CANCEL/RESCHEDULE PATIENT APPOINTMENTS
Patient: SPALDING,BEVERLY A   FMP/SSN: 31/595-10-3377
Clinic: GENERAL MEDICINE   Clinic Phone: 234-0932
Provider: KINLAW,VALERIE   ATC Category:
Detail Codes: Appt Type:
Time Range: 0001 to 2400   Duration:
Dates: Srv Type:
Days of Week:
===
WED 1500 05 SEP 00 WELL 30 PE BPAD BPNPR   GMED KINLAW,VALERIE

===
Use SELECT key to select appointments to be cancelled/rescheduled

================================ **End of Screen** ================================

6. Each patient appointment displayed in the middle window will now include the appointment duration and up to 3 appointment detail codes, if any, along with day, date and time of the appointment, appointment type, clinic abbreviation and/or provider.

7. As soon as you select a pending appointment from the list, the system will redisplay the CANCELLATION BY PATIENT screen and action bar and allow you to cancel or reschedule the selected pending appointment.

8. If you elect to reschedule the pending appointment, the system will redisplay the BOOKING SEARCH CRITERIA screen and require you to enter an Access To Care category code.

9. Once the ATC category code has been entered the system will then search for and display all available appointment slots based on search criteria entered (e. g., ATC category code) and/or the appointment data being rescheduled (e.g., appointment type, provider, duration etc.).

10. As in all HCF available appointment searches, the system will search for available appointment slots based on the search criteria entered. The system will display a list of available appointment slots on the appropriate HCF Booking screen (PCM Booking, Referral Booking, Non-Enrolled Booking, or Self-Referral Booking screen) depending on which booking option was used to book the appointment being rescheduled.

11. The system then allows you to book the appointment, modify the selected appointment data prior to booking the appointment and/or quit the booking process (refer to the appropriate HCF Booking option in this IUG Section 3 for more details.)

Note: An appointment can be found for a patient by selecting the action bar option "(S)earch Schedule". The next prompt allows you to enter a patient's name.

O. Cancel By Facility

Two new fields, Duration and Detail Codes, have been added to the FACILITY
CANCELLATIONS schedule display window.   The Cancel By Facility option is used to enter
data on appointments canceled by the MTF.

Use the following menu option.

1. **MENU PATH: PAS=>S=>SCHE=>MSCH=>CMSC**

2. If you select the Cancel By Facility option, the system will prompt you to enter the clinic,
   provider and date range for the schedule slots to be cancelled.

3. As soon as you have entered the Schedule Search Criteria, the system will load the schedules
   and ask you to cancel all the schedules for the date range entered.

4. If you elect to cancel all the schedule slots, the system will prompt you to enter a reason for
   cancellation.

5. If you elect to cancel individual schedule slots, the system displays the FACILITY
   CANCELLATION screen and allows you to select the slots to be cancelled (refer to Screen
   3.4-36). New fields are in bold.

================================ **Screen 3.4-36** ================================

```
                    FACILITY CANCELLATIONS
Clinic: PRIMARY CARE CLINIC                           Provider: POTTER,HARRY
  Time   AT   Wkl Type  Dur  Detail Code              Stat         #Pt/#Book
═══════════════════════════════════════════════════════════════════════════════
07 Aug 00 MONDAY
  0700  PCM  C            30  PE  BPAD                 OPEN         1/0
  0730  PCM  C            30  PE  BPAD                 OPEN         1/0
  0800  PCM  C            30  PE  BPAD                 OPEN         1/0
  0830  PCM  C            30  PE  BPAD                 OPEN         1/0
  0900  PCM  C            30  PE  BPAD                 OPEN         1/0
  0930  PCM  C            30  PE  BPAD                 BOOKED       1/1
  1000  PCM  C            30  PE  BPAD                 FROZEN       1/0
  1030  PCM  C            30  PE  BPAD                 FROZEN       1/0
  1100  PCM  C            30  PE  BPAD                 WAIT         1/0
═══════════════════════════════════════════════════════════════════════════════
Use SELECT Key to select slots to CANCEL
```

================================ **End of Screen**   ================================

6. Three new fields, Duration, Detail Codes and Workload Type, have been added to the
   FACILITY CANCELLATIONS schedule display window.

7. When you have selected one or more schedule slots to cancel and pressed 'RETURN' to
   continue, the system will prompt you for a cancellation reason.

8. Once you have entered the reason for cancellation, and if any of the cancelled schedule slots
   have been previously booked, the system will display the CANCELLATION NOTICES
   screen (refer to Screen 3.4-37). New fields are in bold.

```
================================ Screen 3.4-37  ================================

CANCELLATION NOTICES 26 Jul 2000     RICHARD,PATRICIA                        PAS 511

TIME  TYPE  DUR  DETAIL CODES              PATIENT           FMP/SSN
==================================================================================
 1730  PCM   30   PE   BPAD                    STONER,SUZANNE 20/665-33-2112
   Cancel Reason:   PROV CANCELLED            Appt Comment:



Use SELECT Key to identify Patients to MAIL Cancellation Notices to OR
Press <RETURN> to Telephone, Reschedule or Delete Patients from notify list

================================  End of Screen   ================================
```

9. The appointment duration and any detail codes linked to the cancelled appointment will be displayed on the CANCELLATION NOTICES screen and will be added to the CANCELLATION NOTICES hardcopy output.

10. If you elect to contact a patient whose appointment has been cancelled, the system will allow you to reschedule the appointment that was cancelled by the facility. If you elect to reschedule the cancelled appointment, the system will search for available appointments based on the appointment cancelled. The system will search for and, depending on which HCF booking option was used to book the cancelled appointment, display a list of all available appointment slots on the appropriate HCF booking screen. The system will then allow you to select a new appointment slot from the display list and book the appointment for the specified patient.

P. Slot Comment Indicator

Appointment slots that contain Slot Comments will have a tilde (~) to the left of the appointment slot. If a user wishes to view the Slot Comment, the cursor should be positioned to the left of the appointment slot and the F9 function key used to view the details of the appointment slot including the Slot Comment. (Refer to Section 3.4.2.2 P for details).

1. You may view Slot Comments for an appointment slot containing a tilde by positioning the cursor to the left of the appointment slot and pressing the F9 function key. Refer to Screen 3.4-38.

================================ **Screen 3.4-38** ===================================

NON-ENROLLEE SINGLE PATIENT BOOKING
   Patient: BABCOCK,DIANA   FMP/SSN: 20/555-40-3403
Place of Care: DAN'S CARDIOLOGY/N-IN   PLOC Phone: 646-3457
 Detail Codes: ATC Category: ROUTINE
  Provider: Appt Type:
  Location: Spec Type:
 Clinic Spec: Provider Spec:
  Date Range: 11 Oct 2001 to 18 Oct 2001   Days of Week: M TU W TH F SA SU
  Time Range: 0001 to 2400   Duration:
?
  MON 0830 15Oct01 ACUT 1/0 30   CAMPBELL,A
  MON 0900 15Oct01 ACUT 1/0 30   VIDOSIC,D
  MON 0930 15Oct01 ACUT 1/0 30   CAMPBELL,A
 ~MON 1000 15Oct01 ACUT 1/0 30   VIDOSIC,D
 ~MON 1030 15Oct01 ACUT 1/0 30   VIDOSIC,D
 ~MON 1100 15Oct01 ACUT 1/0 30   VIDOSIC,D
+ MON 1130 15Oct01 ACUT 1/0 30   VIDOSIC,D
?
Use SELECT key to select appointment to be booked
Press F9 to view additional appointment data

================================ **End of Screen**   ===================================

2. Once you have used the F9 function key, you will see the appointment slot details including
    the Slot Comment. Refer to Screen 3.4-39. The Slot Comment is in bold.

================================ **Screen 3.4-39** ===================================

NON-ENROLLEE SINGLE PATIENT BROWSE
Patient: BABCOCK,DIANA   FMP/SSN: 20/555-40-3403
Clinic: DAN'S CARDIOLOGY/N-IN
Clinic Phone: 646-3457
Provider: VIDOSIC,DANIEL   Date: 15 Oct 2001
?
 ~MON 1000 15Oct01 ACUT 1/0 30   30 MIN OPEN
 Slot Comment: TEST

        Facility: NMC PORTSMOUTH   ATC Reporting: YES
        Division: NAVY INPATIENT DIVISION ATC Category: ROUTINE
   Building Name: DAN'S BUILDING   ATC Standard: 7 DAYS
  Building Number: 23
  Street Address: 102600
           ZIP: 92121
           City: LA JOLLA
          State: CALIFORNIA
          Name: DAN'S CARDIOLOGY
  Clinic Location: 2ND FLOOR
 Clinic Availability:
+   Telephone: 646-3457
?
Use NEXT SCREEN/PREV SCREEN keys to view text or Press RETURN to continue

================================ **End of Screen**   ===================================

3. If you decide to use the Browse feature to split, join, or overbook, you will also see the availability to see Slot Comments indicated by the tilde in front of appointment slots. Refer to Screen 3.4-40.

================================ **Screen 3.4-40** ==================================

```
          NON-ENROLLEE SINGLE PATIENT BROWSE
Patient: BABCOCK,DIANA              FMP/SSN: 20/555-40-3403
Clinic: DAN'S CARDIOLOGY/N-IN
Clinic Phone: 646-3457
Provider: VIDOSIC,DANIEL             Date: 15 Oct 2001
?
 -MON 0800 15Oct01 ACUT  1/1  30              30 MIN  BOOK
  MON 0900 15Oct01 ACUT  1/0  30              30 MIN  OPEN
 ~MON 1000 15Oct01 ACUT  1/0  30              30 MIN  OPEN
 ~MON 1030 15Oct01 ACUT  1/0  30              30 MIN  OPEN
 ~MON 1100 15Oct01 ACUT  1/0  30              30 MIN  OPEN
  MON 1130 15Oct01 ACUT  1/0  30              30 MIN  OPEN
  MON 1200 15Oct01 ACUT  1/0  30              30 MIN  OPEN
  MON 1230 15Oct01 ACUT  1/0  30              30 MIN  OPEN
  MON 1300 15Oct01 ACUT  1/0  30              30 MIN  OPEN
+ MON 1330 15Oct01 ACUT  1/0  30              30 MIN  OPEN
?
Select one slot to Change, Split, Book, or Overbook.
Select multiple consecutive slots to Join.
Press F9 to view additional appointment data
```

================================ **End of Screen** ==================================

4. Again, you can view the appointment slot details including the Slot Comments by pressing the F9 function key. Refer to Screen 3.4-41. The slot comment is in bold.

================================= **Screen 3.4-41** ===================================

              NON-ENROLLEE SINGLE PATIENT BROWSE
Patient: BABCOCK,DIANA   FMP/SSN: 20/555-40-3403
Clinic: DAN'S CARDIOLOGY/N-IN
Clinic Phone: 646-3457
Provider: VIDOSIC,DANIEL   Date: 15 Oct 2001
?
  ~MON 1100 15Oct01 ACUT   1/0 30   30 MIN OPEN
  Slot Comment: TEST

        Facility: NMC PORTSMOUTH   ATC Reporting: YES
         Division: NAVY INPATIENT DIVISION   ATC Category: ROUTINE
    Building Name: DAN'S BUILDING   ATC Standard: 7 DAYS
   Building Number: 23
    Street Address: 102600
           ZIP: 92121
           City: LA JOLLA
          State: CALIFORNIA
           Name: DAN'S CARDIOLOGY
   Clinic Location: 2ND FLOOR
  Clinic Availability:
+   Telephone: 646-3457
?
Use NEXT SCREEN/PREV SCREEN keys to view text or Press RETURN to continue

=============================== **End of Screen**   ===============================

3.4.2.3 Business Rules

1. You may select up to three appointment detail codes to add/edit/delete to an individual patient appointment during the HCF booking process.

2. You will be able to enter/edit appointment detail codes during End of Day processing or when booking the appointment.

3. You may delete any appointment detail code linked to an individual schedule slot at the time the schedule slot is booked.

4. The appointment type duration for a schedule slot may not be changed during the booking process. You may, however, modify the appointment duration by splitting and joining slots using the Browse, Single Patient Booking function.

5. The system provides the capability to further restrict which users are permitted to change the appointment type and/or detail codes via security keys. For each appointment type at the clinic and/or provider level, an authorized user may enter a site definable security key in the Appointment Change Authority file in the Clinic and/ Provider Profile. This security key will then restrict which users may change the appointment type and/or any detail codes linked to the schedule slot at the time of booking.

6. The system will now allow an authorized user to narrow the available appointment slots search by selecting and entering duration and appointment detail codes as secondary search

criteria in all HCF Booking options. Clinic, provider and/ or specialty type and location are required primary search criteria in most HCF Booking options.

7. During appointment searches, you may search for available appointments using up to three appointment detail codes. The use of more appointment detail code categories used in the search will increase the probability of null searches.

8. The system will allow the authorized user to search for available appointment slots by entering only detail codes as secondary search criteria. The system will search for and display only those available appointment slots that have exactly the same detail codes and/or contain a subset of the detail codes entered as search criteria.

9. The system will require you to select an appointment type when Duration is selected as a secondary search criteria.

10. The system will continue to prompt you to enter an Access to Care (ATC) category prior to initiating an available appointment search.

11. If you elect to join two consecutive appointment schedule slots with appointment detail codes that are not an exact match, the system will not display any detail codes on the Single Patient Browse- Change screen. You must enter the applicable detail codes for the newly joined schedule slot.

12. The Browse option will continue to be available in all HCF Booking functions with the exception of the Log Non-MTF Appointment function.

13. You will be able to modify appointment type and details codes via the Modify Appt action from all Health Care Booking options in MCP.

14. If you modify the appointment type, detail codes, or workload type during the booking process, the system will store those changes in the new Patient Appointment record for that appointment. The system will not update the appointment type/detail codes linked to the schedule slot in the Schedulable Entity file. If the pending appointment is cancelled, the system will then change the slot status from pending to open and display the original appointment type and/or detail codes for that schedule slot.

15. Self-Referral Booking will be accessible as a new HCF menu option and also as a new action on the main HCF Booking screen in the HCF Booking.

16. If the Clinic Type field in the Clinic Profile is set to Non-Count for the Clinic where the appointment is being scheduled, the system will automatically default the Workload Type field on the File Appointment screen to Non-Count for the appointment being booked and make the field non-editable.

17. If the Clinic Type field in the Clinic Profile is set to count, the system will default the current Workload Type, for the selected schedule slot being booked, from the Schedulable Entity file and allow the authorized HCF to modify the workload type as appropriate.

18. An MCP HCF or Front Desk Clerk with the SD WK LOAD security key may modify the Workload Type for an appointment booked with a provider in a Count medical clinic. If that user does not possess the key, he/she will be unable to modify the Workload Type.

19. When the appointment is filed, the system will store the appointment data along with the workload type for the newly booked appointment in the Patient Appointment file only.

20. When the appointment status is changed from Pending to OCC-SVC, ADMIN, or LWOBS using EOD Processing, the system will automatically set the Workload Type for the appointment being filed to Non-Count.

21. Appointment slots that contain Slot Comments will have a tilde (~) to the left of the appointment slot. If a user wishes to view the Slot Comment, the cursor should be positioned to the left of the appointment slot and the F9 function key used to view the details of the appointment slot including the Slot Comment. (Refer to Section 3.4.2.2 P for details).

3.4.3   File and Table Change

A. Appointment detail codes must be in the Appointment Detail Codes file before they can be linked to an appointment being booked. (MENU PATH: PAS=>S=.FILE=>DFIL).

B. Specialty Care clinics that do not require Referrals/Consults should set the Clinic Profile field "Self-Referral Allowed" to YES.

C. The Clinic Specialty must be populated for clinics that will accept Self Referrals. (MENU PATH: PAS=>S=>PROF=>CPRO).

D. Clerks who are authorized to modify the Workload Type must be assigned the SD WK LOAD security key. Clerks who are authorized to modify the Appointment Detail codes, Duration, Appointment Type must be assigned the SD APPT STAND security key. DBAs and clinic supervisors should ensure that only trusted, knowledgeable users (clerks and supervisors) are assigned those keys. Assignments of those keys to all clerks may be detrimental to the facility's workload accounting status.

3.4.4   Implementation Issues

A. Detail Codes may be populated in the clinic profile. If they are, booking clerks will see a pick list of those detail codes first but may see the entire list if none is selected.

B. Referrals no longer have to be entered for all visits by Prime patients to Specialty care clinics that do not require it, such as for Optometry or Dental Clinics still using CHCS. MTFs may use the (S)elf Referral option/action instead of the old PAS option BOK which will no longer be available. (Note: some sites may still be using PAS BOK on a limited basis for some ancillary services).

3.5   OPERATIONAL FORCES (OPS FORCES) BOOKING

3.5.1   Overview of Change

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Health Care Finder PCM Booking module has been modified to provide the capability to book a PCM appointment for an Active Duty patient, whose enrolling DMIS ID is defined as Ops Forces, with any provider in any place of care in any MCP Provider Group of which the patient's assigned PCM is a member.

A new "OPS Forces PLOC" field will be added to the MCP Place Of Care Profile in the Place of Care Enter/Edit option on the Provider Network File/Table Maintenance Menu in MCP. If the Ops Forces PLOC flag is set to 'YES' in the patient's enrollment place of care profile, the system will allow the user to book an appointment for the Ops Forces patient with any provider in any place of care in any MCP Provider Group of which the patient's assigned PCM is a member.

3.5.2   Detail of Change

The Ops Forces booking change provides the capability to book appointments for active duty Ops Forces personnel using PCM Booking in Health Care Finder Booking.

This Detail of Change section includes: 1) the functional dependencies, 2) the workflow used, and 3) the business rules that apply to Ops Forces Booking.

3.5.2.1   Functional Dependencies

The "OPS Forces PLOC" field must be set to 'YES' for the place of care associated with the enrollment. This field is found only in the MCP menu option PLAC.

The patient's assigned PCM must be a member of the appointed MCP Provider Group

3.5.2.2   Workflow of Ops Forces Booking

This new capability is added as a new field in the Place of Care menu option. The Ops Forces Booking option is used to book an appointment for an Operational Force patient to a new place of care.

1. **MENU PATH: PAS=>M=>FMCP=>=PTAB=>PLAC**

2. As soon as you select the Place of Care Enter/Edit option, the system allows you to enter a new place of care or edit an existing place of care to which PCMs for Operational Forces are assigned.

3. On the GRP PL2a PLACE OF CARE screen, the system will allow you to set the new OPS FORCES PLOC field to 'YES'(refer to Screen 3.5-1). The new field is in bold.

================================= **Screen 3.5-1** =================================

```
MCP PLACE OF CARE: PRIMARY CARE CLINIC              GRP PL2a   PLACE OF CARE

================================================================

              Type of Facility:  MULTISERVICE CLINIC
                  Appt Contact:
                      DMIS ID#:  0124    NMC PORTSMOUTH
            OPS Forces PLOC:  YES      ←------(New Field)

-----------------------------Hours of Service-------------------------------
Day of Week          AM               PM
 MONDAY             0800 -  1100        1201  -  1700
 TUESDAY            0800 -  1200        1230  -  1700
 WEDNESDAY          0800 -  1200        1230  -  1700
 THURSDAY           0800 -  1200        1230  -  1700
+ FRIDAY            0800 -  1200        1230  -  1600


Ask for Help = HELP    Screen Exit = F10    File/Exit = DO       INSERT OFF
```

================================= **End of Screen** =================================

4. When the "OPS FORCES PLOC" field for the place of care linked to the enrollment is set to 'YES', the system will allow you to book an appointment for the Ops Forces patient with any provider in any place of care in any MCP Provider Group of which the patient's assigned PCM is a member.

5. When you log into HCF Booking and select PCM Booking, the system will search for any available appointment slots with the patient's assigned PCM. If no schedule slots are available for PCM Booking, then the system will check the enrolled patient's assigned place of care profile. If the patient's enrollment place of care allows Ops Forces Booking, the system will prompt you to search for and display all available appointments with any provider in any place of care linked to any MCP Provider Group that the assigned PCM is a member (refer to Screen 3.5-2).

=============================== **Screen 3.5-2** ===================================

OPS FORCES PCM BOOKING

Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Patient Type: MCP/ACTIVE DUTY   ATC Category: ACUTE
Place of Care: SICKBAY 12   Appt Type:
PLOC Phone: 234-5678   Spec Type:
Provider: POTTER,HARRY SD   Clinic Spec:
Location: 23708   Provider Spec:
Date Range: 20 Aug 2000 to 01 Oct 2000   Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400

==

==
Selected patient is an OPS FORCES MCP patient. Do you want to search for available appointments with other Providers in all MCP Provider Groups where the assigned PCM is a member - NO? Yes//

=============================== **End of Screen** ===============================

6. If you accept the prompt to search for available appointments with other providers, the system will then search for and display a list of all providers/places of care with available appointments where the assigned PCM is a member of the group. The system will prompt you to select the provider/place of care to book an appointment (refer to Screen 3.5-3).

=============================== **Screen 3.5-3** ===================================

OPS FORCES PCM BOOKING

Patient: BLITON,JERALD   FMP/SSN: 20/278-55-5025
Patient Type: MCP/ACTIVE DUTY   ATC Category: ACUTE
Place of Care: SICKBAY 12   Appt Type:
PLOC Phone: 234-5678   Spec Type:
Provider: POTTER,HARRY SD   Clinic Spec:
Location: 23708   Provider Spec:
Date Range: 20 Aug 2000 to 01 Oct 2000   Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400

        Provider   Place of Care

==

      WEEZLY,ARTHUR   FAMILY PRACTICE/PRIMARY CARE
      DUMBLEDORE,AVERY   GENERAL MEDICINE

==
Use the SELECT key to select the provider/place of care to book a primary care appointment

=============================== **End of Screen** ===============================

7. As soon as you select the provider/place of care from the pick list, the system will search for and display a list of all available appointments and allow you to book the appointment.

3.5.2.3   Business Rules

1. The Enrolling Division for the specified patient must be linked to an OPS Forces DMIS ID.

2. The patient must be Active Duty.

3. The system will only allow an authorized user to book an appointment for the Ops Forces patient with any provider in any place of care in any MCP Provider Group of which the patient's assigned PCM is a member.

3.5.3   File and Table Changes

The "OPS Forces PLOC" field must be set to 'YES' for the place of care associated with the enrollment in Managed Care File and Table build via menu option PLAC. (MENU PATH: PAS=>M=>FMCP=>PTAB=>PLAC).

3.5.4   Implementation Issues

1.   The patient's PCM Place of Care must have the field "OP FORCES PLOC" set to YES for this option to work.

2.   Booking Clerks will only be able to find appointments in Places of Care (Clinics) that the patient's PCM is a member.

3.6   OUTPUT REPORTS/FORMS

3.6.1   Overview of Change

As part of the Appointment Standardization Project Phase II, the following PAS/MCP Output Report/Forms options have been modified to include output appointment detail codes linked to either a schedule slot or an appointment:

- Print Templates
- Print Schedules
- Print Clinic/Provider Roster
- Print Outpatient Encounter Forms
- Display Patient Appointments
- Non-MTF Log Report

The Appointment Type Profile List and the Clinic Profile List options will also be modified to include as output the new data elements that were added to the Appointment Type file (i.e., Medical Appt Type flag) and Clinic Profile (i.e., Clinic Detail Codes multiple and Self-Referring Allowed flag) files.

Two new reports have been developed with this change. The new reports, Self-Referral Booking Report and Appointment Detail Code Schedule Utilization Report may be seen on the Health Care Finders Reports menu, RHCF.

NOTE: With the release of Appointment Standardization Phase II, the PAS workload and the WAM workload generation processes will be modified to accommodate the structural data changes inherent in the above-mentioned change to the Count/Non-Count designation of appointments**.**

3.6.2   Detail of Change

Output reports/forms will include the new appointment detail codes and duration. In addition, two new reports (Self-Referral Booking Report and Appointment Detail Code Schedule Utilization Report) are now available.

Several workload associated Reports will be affected by APS II Structural Changes.

This Detail of Change section includes: 1) the functional dependencies, 2) the workflow, and 3) the business rules that apply to Output Reports/Forms.

3.6.2.1   Functional Dependencies

Appointment Detail Codes will only appear as output on the appropriate reports/forms if they were linked to templates, schedules or appointments at the time templates/schedules were created/edited or when an appointment was booked.

3.6.2.2 Workflow of Output Reports/Forms

A.   List Appointment Type

The List Appointment Type Report will illustrate the appointment types, whether or not they are searchable, their status, category and if they are medical appointment types or not. Use the following menu path.

 1. **MENU PATH: PAS=>S=>PROF=>LPRO=>5**

 2. When you elect to generate the Appointment Type Profile List, the new MEDICAL APPT TYPE field will be displayed as output on the report (refer to Screen 3.6-1).

================================ **Screen 3.6-1** ===================================

APPOINTMENT TYPE PROFILE LIST   28 Jun 2000@0936   PAGE 1

| | | SEARCHABLE APPT | | | MEDICAL |
NAME	DESCRIPTION	SLOTS?	STATUS	CATEGORY	APPT TYPE
ACUT	ACUTE APPT	YES	ACTIVE	INITIAL	YES
ACUT$	ACUTE APPT; MTF	YES	ACTIVE	INITIAL	YES
APV	AMBULATORY PATIENT VISIT	YES	ACTIVE	INITIAL	YES
EST	ESTABLISHED FOLLOW-UP	YES	ACTIVE	FOLLOW-UP	YES
EST$	ESTABLISHED FOLLOW-UP; MTF	YES	ACTIVE	FOLLOW UP	YES
EXAM	YEARLY EXAM	YES	ACTIVE	FOLLOW_UP	NO
EXTRA	EXTRACTION APPOINTMENT	YES	ACTIVE	FOLLOW_UP	NO
GRP	GROUP	YES	ACTIVE	INITIAL	YES
GRP$	GROUP; MTF	YES	ACTIVE	INITIAL	YES
N-MTF	NON-MTF APPOINTMENT	NO	ACTIVE	FOLLOW_UP	YES
PCM	INIT PRIMARY CARE APPT	YES	ACTIVE	INITIAL	YES
PCM$	INIT PRIMARY CARE APPT; MTF	YES	ACTIVE	INITIAL	YES
PROC	PROCEDURE APPT	YES	ACTIVE	INITIAL	YES
PROC$	PROCEDURE APPT; MTF	YES	ACTIVE	INITIAL	YES
ROUT	ROUTINE APPT	YES	ACTIVE	INITIAL	YES
ROUT$	ROUTINE APPT; MTF	YES	ACTIVE	INITIAL	YES
SPEC	INIT SPECIALTY CARE APPT	YES	ACTIVE	INITIAL	YES
SPEC$	INIT SPECIALTY CARE APPT; MTF	YES	ACTIVE	INITIAL	YES
T-CON*	TELEPHONE CONSULT	NO	ACTIVE	INITIAL	YES
TCON	TELEPHONE CONSULT	NO	ACTIVE	INITIAL	YES
TCON$	TELEPHONE CONSULT; MTF	NO	ACTIVE	INITIAL	YES
WELL	WELLNESS/HEALTH APPT	YES	ACTIVE	INITIAL	YES
WELL$	WELLNESS/HEALTH APPT; MTF	YES	ACTIVE	INITIAL	YES

================================ **End of Screen** =================================

B.   Clinic Profile List

Note the new Self-Referrals Allowed and Detail Codes fields. The Clinic Profile List Report illustrates pertinent data plus the new fields concerning self-referral and detail codes. Use the following menu path.

1. **MENU PATH: PAS=>S=>PROF=>LPRO=>3**

2. When you elect to generate the Clinic Profile List, the new SELF-REFERRING ALLOWED field and the new DETAIL CODES multiple will be displayed as output on the report (refer to Screen 3.6-2). New fields are in bold. Any Detail codes displayed on this profile will appear on the clinic list of Detail codes when booking appointments or creating/editing templates and schedules. New fields are in bold.

=============================== **Screen 3.6-2** ===================================

CLINIC PROFILE LIST   28 Jun 2000@1053   PAGE 1
==

Name: PRIMARY CARE CLINIC-NO
Abbreviation: PCCNO
Facility: MC NAVSTA SEWELLS
Division: NAVY OUTPATIENT DIVISION
Building Name:
Building Number:
Street Address:
ZIP: 23708
City:
State:
Clinic Location:
Clinic Availability:
Telephone:
Enrollee Lockout: YES
Type of Care: BOTH SPECIALTY AND PRIMARY CARE
Service: FAMILY PRACTICE SERVICE
Department: DENTAL DEPT
MEPRS Code: BGAA
Clinic Specialty: FAMILY PRACTICE /PRIMARY CARE
Wait List Activated: NO
Maximum Wait List Days: DAY(S)
Wait List Provider Mandatory:
Wait List Hold Duration: DAY(S)
Automatic Wait List Processing:
Schedule Hold Duration: 2 DAY(S)
Prompt for Requesting Service: NO
Patient Record Pull: 1 DAY(S)
Clinic Type: COUNT
Radiology Record Pull: 1 DAY(S)
Check Holiday File: YES
Roster Production: 1 DAY(S)
Activation Status: ACTIVATED
Access to Care Reporting: YES
Self-Referrals Allowed: **YES**
Prepare Reminder Notices: 14 DAY(S)
Cost Pool Code:
Available Schedule: 30 DAY(S)
Clinic Appt Instructions:
Detail Codes:

                       BEPC BIRTH AND EARLY PARENTING CLASS
                       BK   BACK PAIN OR PROBLEM
---Appointment Types---

Appointment Type: PCM
Duration: 30 MINUTES
Status: ACTIVE
Workload Type: COUNT
Referral Required: NO
Pull Patient Record: YES
Pull Radiology Record: NO
Produce Encounter Form: YES
Send Reminder Notice: YES
Total # of Overbooks: 0
Max # of Overbooks per Slot:
Instructions:

Press <RETURN> to continue

=============================== **End of Screen** ===============================

3-85

C.   Print Schedules

The Print Schedules option illustrates schedule data with the new addtion of detail codes,
workload type and duration. Use the following menu path.

1. **MENU PATH: PAS=>S=>SCHE=>PSCH**

2. When you elect to print schedules for a specified clinic and/or provider for a specified date
range, the appointment duration, detail codes, and workload type currently linked to a
schedule slot will be displayed as output on the report (refer to Screen 3.6-3). New fields are
in bold.

```
============================== Screen 3.6-3  ===============================

NMC PORTSMOUTH                                    28 Sep 2001@1345    Page 1
                                PROVIDER SCHEDULE
                                FRIDAY 28 Sep 2001

Division: NAVY INPATIENT DIVISION
  Clinic: CARDIOLOGY
Provider: CALIF,SONNY
===========================================================================
Start Appt  Wkl Open/                                                  Slot
Time  Type  Typ Book Dur Detail Codes          Slot Comment           Stat
===========================================================================
0700  PCM    C   1/0  30 BPAD                   TEST Comment          OPEN
0730  PCM    C   1/0  30 BPAD                   TEST                  OPEN
0800  PCM    C   1/0  30 BPAD                   TEST                  OPEN
0830  PCM    C   1/0  30 BPAD                   TEST                  OPEN
0900  PCM    C   1/0  30 ANGER BPAD             test1                 OPEN
0930  PCM    C   1/0  30 BPAD                   TEST                  OPEN

============================== End of Screen   ==============================
```

D.   Print Clinic/Provider Rosters

The Print Clinic/Rosters includes pertinent data plus the new detail codes.

1. **MENU PATH: PAS=>M=>CDSK=>ORM**

2. When you elect to print Clinic/Provider Rosters, Appointment Duration and Detail Codes
currently linked to a schedule slot and/or appointment will be displayed as output on the
report (refer to Screen 3.6-4). New fields are in bold.

```
================================ Screen 3.6-4  =================================

NMC PORTSMOUTH                                      02 Jul 2000@1443 Page 1
              Personal Data - Privacy Act of 1974 (PL 93-579)
               PROVIDER ROSTER (One Clinic)
               From: 07 Aug 2000   To: 07 Aug 2000

Division: NAVY OUTPATIENT DIVISION           DEPT: PRIMARY CARE DEPARTMENT
Clinic: PRIMARY CARE CLINIC - NO             Provider: FROST,ROBERT
==============================================================================
Time Appt      Detail                    Name                   FMP/SSN
     Type   Dur Code                      Out/In Ward   Home Phone   Work Phone
==============================================================================
'*' next to patient name indicates a FROZEN-BOOKED slot
'#' next to patient name indicates the schedule slot has been deleted

0700 PCM   30 BPAD  PE               BLITON,JERALD          20/004-23-3298

                                     OUTPATIENT  H: 535-7265      W: 488-2301

0730 PCM   30 BPAD  SCH              ANDERSON,FREDRICK      20/430-18-3498
                                     OUTPATIENT  H: 535-6619      W: 488-4502

0800  PCM  30 BPAD  BK               WARWICK,ANNE           20/234-500-3285
                                     OUTPATIENT  H: 535-4329      W: 488-7231


==============================  End of Screen  ==============================
```

E. Print Outpatient Encounter Form

The Outpatient Encounter Form now includes the appointment duration and the new detail codes. Use the following menu path.

1. **MENU PATH: PAS=>M=>CDSK**

2. When you elect to print an outpatient encounter form for a scheduled appointment, Appointment Duration and Detail Codes currently linked to a pending appointment will be displayed as output on the form (refer to Screen 3.6-5). New fields are in bold.

================================ **Screen 3.6-5** ==================================

NMC PORTSMOUTH   Division: PORTSMOUTH
          Personal Data - Privacy Act of 1974 (PL 93-579)   Automated Version of SF600
                        Printed: 05 Aug 2000@0800

Primary Care Clinic   CRAWFORD,JACQUI   05 Aug 2000@1030   PCM   30   BABA
Detail Codes: PE BRAD
REF: CMT:
RSN:
INSURANCE YES/NO:

BP: PULSE: RESP: TEMP: HT: WT: AGE:
==
ALLERGIES:

ADDITIONAL COMMENTS:

==
20/278-55-5025 BLITON,JERALD   A11
                01 Jan 1960 MALE   W:619 535 7265   H:619 546 6121
                Spon: BLITON,JERALD   CIC:
                CS: Rank: CPT   D:619 535 7265
SF600   Unit: CO A 131 SIG BN   RR: NI - OUTPATIENT RECORDS

================================ **End of Screen** ==================================

F.   Display Patient Appointments

The Display Patient Appointments gives the appointment history plus the appointment duration
and the new detail codes. Use the following menu path.

1. **MENU PATH: PAS=>M=>CDSK=>DPA**

2. When you elect to display/print a patient's appointment history, Appointment Duration and
   Detail Codes currently linked to an appointment will be displayed as output (refer to Screen
   3.6-6). New fields are in bold.

=============================== **Screen 3.6-6** ===================================

DISPLAY PATIENT APPOINTMENTS
Personal Data - Privacy Act of 1974 (PL 93-579)
FUTURE APPOINTMENTS FOR SPALDING,BEVERLY A 31/595-10-3377

CLINIC/DIV	PROVIDER	DATE/TIME	APPT TYPE**/DUR** **DETAIL CODE**	STATUS
PRIMARY CARE CLINIC /N-IN	PETERSON,PET	02 Jul 2000@1300	NEW 30 PE BPAD	PENDING

WAIT LIST REQUESTS FOR SPALDING,BEVERLY A 31/595-10-3377

CLINIC/DIV	**APPT TYPE/DUR** **DETAIL CODE**	PRI	DATE IN	TARGET DATE	PROVIDER
PRIMARY CARE CLINIC /N-IN	WELL 30 SCOLI BPAD		02 Jul 2000	01Aug 2000	

Press <RETURN> to continue

=============================== **End of Screen** ===============================

G.   Non-MTF Log Report

The Non-MTF Log Report will now include the appointment detail codes. Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>BHCF**

2. When you elect to display/print the Non-MTF Log Report, any Appointment Detail Codes currently linked to a Non-MTF appointment will be displayed as output (refer to Screen 3.6-7). New fields are in bold.

================================ **Screen 3.6-7** ================================

NMC PORTSMOUTH   04 Jul 2000@1423   Page 1
         Personal Data - Privacy Act of 1974 (PL 93-579)

                                Non MTF Appointment Log By Patient
                                 From: 08 Sep 1999   To: 04 Jul 2000

Patient Name   Patient SSN FMP/Sponsor SSN   Current Enrollment Status
BLITON,JERALD   278-55-5025 20/278-55-5025   ENROLLED

Place of Care
     Provider
     Appointment Date/Time   Referral Number   **Appointment Detail Codes**

NON-MTF CLINIC

     TARPIN,DANIELE
     ----
     01 Feb 2000@1102   20000000074   **PE BPAD**
     01 Feb 2000@1111   20000000075   **SCH BPAD BPNPR**
     02 Feb 2000@1045   20000000078
     04 Feb 2000@1354   20000000079

================================ **End of Screen** ================================

H.   Self-Referral Appointment Booking Report

Two new reports have been created in the APS II project. They are the Self-Referral Booking
Report and the Appointment Detail Code Report Schedule Utilization Report. The new reports
are in bold.

================================ **Screen 3.6-8** ================================

     1   Specialty Type Referral Summary
     2   Provider Network List
     3   PCM Activity Report
     4   Provider Patient Workload Report
     5   Refused Appointments Report
     6   Telephone Consult Report
     7   Non MTF Appointment Log
     8   Appointment Order Review Report
     9   Print SF513 for Appointments
     10   Generate DD2161 - Referral for Civilian Care
     11   Non Appointed Consults/Referrals by Rev Date/Time
     12   Referral Statistics by Consult Procedure Name
     13   Requested Location Referral Statistics
     14   Requesting Location Referral Statistics
     15   Consult Delta Time Rpt for Reviewing and Appting
     16   Self-Referral Booking Report
     17   Appointment Detail Code Report Schedule Utilization Report

Select Health Care Finder Reports Menu Option:

================================ **End of Screen** ================================

The Self-Referral Appointment Booking Report is a new report added to the HCF Reports menu. (Refer to Screen 3.6-9). Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>RHCF=>17**

2. As soon as you elect to generate the Self-Referral Booking Report, the system displays the SELF-REFERRAL BOOKING REPORT screen and allows you to select the division/s, clinic, provider, date range, and output device (refer to Screen 3.6-9).

================================= **Screen 3.6-9** ===================================

SELF-REFERRAL BOOKING REPORT

Division:
Date Range:
===

===
Select (O)ne, (M)ultiple, (A)ll Divisions or (Q)uit:

=============================== **End of Screen** ================================

3. When you select one division and enter the appropriate division for which to report the Self-Referral Booking Summary report data, the system will then prompt you to select one, multiple or all clinics. If you select one clinic, the system will then prompt you to select one, multiple or all providers in the specified clinic.

4. If you select multiple divisions or all divisions, the system will automatically report all providers in all self-referrals allowed clinics in all divisions. If you select one division but multiple or all clinics within the specified division, the system will generate the report for all providers within the specified clinics.

5. Once you select one, multiple or all divisions/clinics/providers, the system displays the Report Month & Year OR '^' to enter a specific date range: [month/year]// prompt. The system allows you to accept the default of the previous month/year or to enter '^' in order to enter a specific start and stop date for the output report.

6. When the date range for the output report has been entered, the system displays the COMPLEX REPORT warning message in the middle window of the SELF-REFERRAL BOOKING REPORT screen and the 'Do you want to proceed with this report? No//' prompt.

7. If you respond 'YES' to the 'Do you want to proceed with this report? No//' prompt, the system will prompt you for the output device.

8. When you have entered the appropriate output device and pressed 'RETURN' to continue, the system will return you to the reports menu and generate the report to the specified output device (refer to Screen 3.6-10). The new fields are in bold.

=============================== **Screen 3.6-10** ================================

```
PORTSMOUTH VA                                              31 Aug 2000@0813 Page 1
                         Personal Data - Privacy Act of 1974 (PL 93-579)
                                  SELF-REFERRAL BOOKING
                             From: 01 Jul 2000 To: 31 Jul 2000
Division: PORTSMOUTH                                        Clinic: GENERAL MEDICINE
==================================================================================
    Appt          Appt      Detail
    Date/Time     Type    Dur Code                          Patient
FMP/SSN
==================================================================================

Clinic Specialty: OCCUPATIONAL HEALTH
================================
 Provider:  SLOAN,MARK
   01 JUL 00  0700  WELL  30   BPAD   HEAD        BLITON,JERALD         20/442-46-4725
   01 JUL 00  0730  WELL  30   BPAD   HEAD       ANDERSON,FREDRICK      20/430-18-3498
   ……..
   31 JUL 00  0800  WELL  30   BPPR   HEAD        WARWICK,ANNE          30/234-50-3285
   …………
 Provider Subtotal: 51

 Provider: POTTER,HARRY
   05 JUL 00  0700  WELL  30   BPAD   HEAD        BLITON,MARK           20/342-20-8623
   05 JUL 00  0730  WELL  30   BPPR   HEAD       ANDERSON,MARIA         30/430-18-3498
   ……..
   30 JUL 00  0800  WELL  30   BPPR   HEAD        LUKE,ANNE             30/004-50-5510
   ……..
 Provider Subtotal:  37

Clinic Specialty Subtotal:  88

Clinic Specialty: PREVENTIVE MEDICINE
================================
 Provider:  KILDARE,RICHARD
   01 JUL 00  0700  WELL  30   BPAD   TOBCES      BLITON,JERALD         20/442-46-4725
   01 JUL 00  0730  WELL  30   BPAD   TOBCES     ANDERSON,FREDRICK      20/430-18-3498
   ……..
   31 JUL 00  0800  WELL  30   BPPR   TOBCES      WARWICK,ANNE          30/234-50-3285
   …………
 Provider Subtotal: 51

 Provider: WELLBY,MARCUS
   05 JUL 00  0700  WELL  30   BPAD   TOBCES      BLITON,MARK           20/342-20-8623
   05 JUL 00  0730  WELL  30   BPPR   TOBCES     ANDERSON,MARIA         30/430-18-3498
   ……..
   30 JUL 00  0800  WELL  30   BPPR   HEAD        LUKE,ANNE             30/004-50-5510
   ……..
 Provider Subtotal:  37

Clinic Specialty Subtotal:  88

        Clinic Total: 384
     Division Total: 1027
```

=============================== **End of Screen** ================================

9. The purpose of the Self-Referral Booking Report is to provide a report by clinic specialty of the number of self-referrals booked to individual clinics that allow self-referral booking within a division for the date range specified. The Self-Referral Booking Report is sorted by division, clinic, clinic specialty, and provider. The output for the report includes the following appointment data booked through the Self-Referral Booking option:

- Appt Date/Time
- Appt Type
- Duration
- Detail Codes
- Patient
- FMP/SSN
- Provider Subtotals
- Clinic Specialty Subtotals
- Clinic Totals
- Division Totals

I. Appointment Detail Code Schedule Utilization Report

The Appointment Detail Code Schedule Utilization Report is a new report added to the HCF Reports menu. Use the following menu path.

1. **MENU PATH: PAS=>M=>HMCP=>RHCF=>17**

2. A new Appointment Detail Code Schedule Utilization Report option has been added to the Health Care Finder Reports Menu (refer to Self-Referral Booking Report option, Screen 3.6-7 – HCF Reports Menu).

3. As soon as you elect to generate the Appointment Detail Code Schedule Utilization Report, the system displays the APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT screen and allows you to select the division/s, clinic, date range, and output device (refer to Screen 3.6-8).

================================= **Screen 3.6-11** =================================

APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT

Division:
Date Range: Clinic:
==

==
Select (O)ne, (M)ultiple, (A)ll Divisions or (Q)uit:

================================= **End of Screen** =================================

4. When you select one division and enter the appropriate division for which to report the Appointment Detail Code Schedule Utilization report data, the system will then prompt you to generate the report for one, multiple, or all clinics within the specified division.

5. If you select one clinic, the system will then prompt you to select one, multiple or all providers in the specified clinic.

6. Once you select one, multiple or all divisions/clinics, the system displays the Report Month & Year OR '^' to enter specific date range: [month/year]// prompt. The system allows you to accept the default of the previous month/year or to enter '^' in order to enter a specific start and stop date for the output report.

7. When the date range for the output report has been entered, the system displays the COMPLEX REPORT warning message in the middle window of the APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT screen and the 'Do you want to proceed with this report? No//' prompt. If you respond 'YES' to the 'Do you want to proceed with this report? No//' prompt, the system will prompt you for the output device. When you have entered the appropriate output device and pressed 'RETURN' to continue, the system will return you to the reports menu and generate the report to the specified output device (refer to Screen 3.6-12). .

8. When the report is generated, CHCS will print a report description before the actual report as in screen 3.6-12.

================================ **Screen 3.6-12** ================================

NMC PORTSMOUTH   27 Sep 2001@1334

Personal Data - Privacy Act of 1974 (PL 93-579)
APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT
From: 15 Sep 2001 To: 27 Sep 2001

The Appointment Detail Code Schedule Utilization Report reports detail code schedule utilization information from both the Schedulable Entity file and the Patient Appointment file.

This report first lists by appointment type the original appointment detail code/s, if any, that were linked to a schedule slot when the provider schedule was created. It reports the number of slots created for each set of appointment detail codes listed. If any of the original detail codes linked to a schedule slot were modified during the booking process, the number of original slots modified is also reported.

This report also lists by appointment type, any new detail codes that were linked to a schedule slot during the booking process. It reports the number of slots with new detail codes.

In addition, the Appointment Detail Code Schedule Utilization Report reports by appointment type and detail code/s the following schedule slot information:

    Number of facility cancellation
     Number of booked appointments
    Number of frozen slots
    Number of open slots
    Number of Waited slots
     % Schedule Slots Created and Booked
     % Schedule Slots Created but not Booked

Personal Data - Privacy Act of 1974 (PL 93-579)
APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT
From: 15 Sep 2001 To: 27 Sep 2001

Division: NAVY INPATIENT DIVISION
  Clinic: CARDIOLOGY

Appt/Type Detail Code	#Slots Created	#Slots Modified	#Appts Modified	#Fac Canc	#Booked Appts	Appointments Available to Patients				% Booked	% Unbooked
						Unbooked Appt Slots					
						Frozen	Open	Waited	Total		
Provider: CALIF,SONNY											
ACUT$											
ANGER	2	0	0	0	0	0	2	0	2	0.00	100.00
ANGER ECHO WEA	3	0	0	0	0	0	3	0	3	0.00	100.00
BPAD	2	0	0	0	0	0	2	0	2	0.00	100.00
BPAD ECG	1	0	0	0	0	0	1	0	1	0.00	100.00
BPAD WEA	14	2	0	0	3	0	11	0	11	21.43	78.57
BPAP	1	0	0	0	0	0	1	0	1	0.00	100.00
CHOL	0	0	2	0	0	0	0	0	0	0.00	100.00
WEO	1	0	0	0	0	0	1	0	1	0.00	100.00
Subtotal:	24	2	2	0	3	0	21	0	21	12.50	87.50
EST											
BPAD CHOL	1	0	0	0	0	0	1	0	1	0.00	100.00
[No Detail Codes]	36	0	0	0	0	0	36	0	36	0.00	100.00
Subtotal:	37	0	0	0	0	0	37	0	37	0.00	100.00
PCM											
BPAD	39	0	0	0	0	0	39	0	39	0.00	100.00
Subtotal:	39	0	0	0	0	0	39	0	39	0.00	100.00
Provider Subtotal:	100	2	2	0	3	0	97	0	97	3.00	97.00
Clinic Subtotal:	199	9	9	0	12	0	187	0	187	6.03	93.97
Division Subtotal:	199	9	9	0	12	0	187	0	187	6.03	93.97

================================ **End of Screen** ================================

3.6.2.3   Workload Report

In the Composite Health Care System (CHCS), the Patient Appointment and Scheduling (PAS) module, the Worldwide Workload Report and the Workload Assignment Module (WAM) report appointment workload data. Previously, when determining whether an appointment is a count or non-count clinic visit, the system checked the Hospital Location file for the current value of the Workload Type field linked to the appointment type for the Kept appointment being reported.

With the release of ASP II, the PAS workload and the WAM workload generation processes will be modified to accommodate the structural data changes inherent in the above-mentioned change to the Count/Non-Count designation of appointments.

Changes to the PAS workload generation process will affect the following PAS Workload Reports:

- Monthly Statistical Report
- Clinic Workload Report
- Command Facility Workload Recap Report
- Facility Cancellation Report
- Patient Cancellation Report
- No-Show Statistical Report

Changes to the WAM workload generation process will affect the following WAM Workload Reports:

- SAS 002   Outpatient Visits
- SAS 003   Total Visits
- SAS 390   Ambulatory Visits/Minutes of Service
- Worldwide Workload Report

3.6.2.4   Access to Care Summary Report

The Access to Care Summary Report was enhanced to add a section for the ATC Category "Future Request". The "Future Request" section will include only statistics for the number of Appointments and the average days to be seen. The section for "Future Requests" will also be included in the ATC ASCII file generated. The ATC Summary report will not include the grand total for "Future Requests" since that category only reports certain statistics.

3.6.3   File and Table Change

There are no File and Table changes to generate reports. Please see previous sections for File and Table Changes regarding the new fields in MCP options.

3.6.4   Implementation Issues

Appointment Detail Codes will only appear as output on the appropriate reports/forms if they were linked to templates, schedules or appointments at the time templates/schedules were created/edited or when an appointment was booked.

All personnel involved with Appointment Utilization Reports should be made aware of the new reports now available. The two new reports are the Self-Referral Booking Report and the Appointment Detail Code Schedule Utilization Report.

3.7   CONVERSIONS

Medical Appt Type Flag Conversion

The Medical Appt Type flag conversion will set the Medical Appt Type flag in the Appointment type file to "YES" for the 18 Standard Appointment Types plus EROOM, N-MTF, APV and T-CON*. Those are the appointment types with the "$" and without (e.g. PCM and PCM$, ACUT and ACUT$, etc.) All non-standard Appointment Types will have their flag set to null.

Daily Templates Conversion:

The Daily Templates Conversion will convert all provider templates linked to a clinic with a location type of C (Clinic) or S (Same Day Surgery). The conversion will populate the new Duration, Workload Type, and Detail Codes fields for each schedule slot in a Daily Template as appropriate.

Provider Schedules Conversion

Based on the software installation date, the conversion will convert all provider schedules linked to any provider in a clinic with a location type of C (Clinic) or S (Same Day Surgery) and created for the previous month, the current month and all future dates. The conversion will populate the new Duration, Workload Type, and Detail Codes fields for each schedule slot in a provider schedule as appropriate.

Patent Appointment Conversion

The Patient Appointment Conversion will convert all Patient Appointment records with an appointment date from the 1st of the previous month, for the current month and all future dates. This conversion will populate the new Workload Type field and Detail Codes field, if appropriate, in each Patient Appointment record.

This page has been
left blank
intentionally.

****

APPENDIX A:

COMMON FILES CHANGES

****

This page has been
left blank
intentionally.

Appendix A - Common Files Changes

COMMON FILES

Not applicable.

This page has been
left blank
intentionally.

****

APPENDIX B:

MASTER CHECKLIST

****

This page has been
left blank
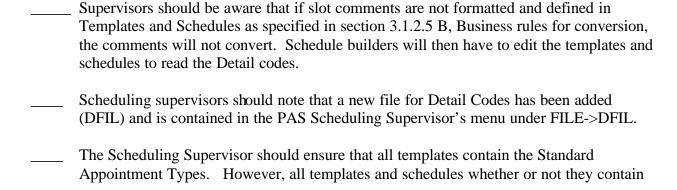intentionally.

Appendix B - Master Checklist

B-1   User Training

_____   Scheduling supervisors should receive 1-2 hours of classroom training. The course content should center on the use of detail codes and standard appointment types in Templates and Schedules, Ops Forces booking, Self Referral Booking and the use of Detail Codes in booking. (Refer to Sections 3.1, 3.2,3.3 and 3.5 of this IUG).

_____   Booking clerks should receive 1 hour- of classroom training. Emphasis should be given to use of detail codes and the appointment search features of Appointment Standardization. Time should also be spent on the new self-referral and Ops Forces features. (Refer to Sections 3.4 and 3.5 of this IUG).

_____   Personnel involved with reports should receive one-half hour of classroom/demonstration training in connection with changes in existing reports and training on the two new reports that will be generated by the APS II Project. (Refer to Section 3.6 of this IUG).

B-2   Implementation Issues

B-2.1 Pre-Load

_____   **Scheduling Supervisors should read the Business Rules in section 3.1.2.5 and ensure that templates and schedules have been prepared in accordance with that section prior to the APS II software load.**

_____   Sites should have performed MCP file and table builds and transitioned to the Managed Care booking process prior to the installation of this enhancement.

_____   Users should be sufficiently trained for the transition to the HCF option and the use of standard appointment types and detail codes.

_____   Prior to the APS II load, templates and schedules should be printed out for the purpose of comparing them post-load.

_____   It's recommended that Templates and Schedules already built should be using the Standardized Appointment Types as much as possible.

_____   Scheduled appointments linked to a schedule slot to be converted will be populated with the Appointment Detail codes in the comment slot.

_____   Supervisors should verify that the template appointment slot comments prior to the load are the format defined in Section 3.1.2.5B of this IUG or they will not be converted. Free text will not be converted. Detail codes placed in the comment field for conversion must be exact matches of Detail codes in the CHCS Appointment Detail code.

B-2.2 Post-Load

_____ File and Table personnel may start adding site definable age appointment detail codes to Clinic Profiles shortly after installation. Detail Codes are not mandatory in the clinic profiles but will make a booking clerk and Template creator's work easier.

_____ Supervisors should compare post-load templates with pre-load templates.

_____ Reports personnel should be reminded of the two new reports to be generated by the APS II Project and that extensive reports should be run during non-prime time. (Note: appointment detail codes will only appear as output on the appropriate reports if they were linked to templates/schedules or appointments at the time templates/schedules were created/edited or when an appointment was booked).

____ Clinics that permit Self Referral should ensure that the clinic profile "Clinic Specialty" and "Self Referral Allowed" fields are populated.

____ Booking clerks, Supervisors and DBA's should be aware that if appointments are not found during use of (Self)-Referral booking, that they should verify the provider's specialty, Clinic Specialty, and the MCP Provider Specialty Type in addition to other normal trouble shooting efforts.

_____ All schedules and templates will be converted whether or not Standard Appointment Types are used. If non-standard Appointment Types are kept in schedules, they will not be useable except for those appointments already booked.

_____ After the installation, set the Medical Appt Type flag to "YES" for those non-standard appointment types the site wishes to continue using.

_____ Supervisors should be aware that if non-standard Appointments Types which are Booked are KEPT, they must be changed to Standard Appointment Types via EOD processing. If not done, EOD processing will not be completed and monthly workload reports will not be completed.

3.8 B-3 INTEGRATION ISSUES

_____ If there is any conflict between the software and the Commander's Guide to Access Success, Tricare policy will supercede. Please refer to the Commander's Guide in all matters of policy. The Commander's Guide to Access Success on the TRICARE Access may be found in the imperatives web page at http://www.tricare.osd.mil/tai.

_____ All MTF clinics including Dental which may see Prime patients without Referrals should ensure that the Self-Referral flag is set to Yes in the Clinic Profile (CPRO).

_____ The Access to Care categories currently in CHCS may display a greater number of days' schedules then the current Tricare standards. In the event of any conflict, booking clerks should be made aware that Tricare Standards are the final authority and they should follow those booking guidelines.

_____ Making an Appointment a Non-Count instead of Count may now be done while making the appointment by modifying the schedule or template. End-of-Day processing may still be used but no longer has to be used. The user will need the new security key **SD WK LOAD** to perform this function.

_____ The Clinic Specialty in the option CPRO is cross-referenced to the MCP Specialty Type file. Appointments booked via the new option, (S)elf-Referral, will locate only those providers with specialties linked to the Clinic Specialty via the MCP Specialty type file. Any changes or additions to the Clinic Specialty field may impact Consult tracking and booking.

_____ The PAS workload and the WAM workload generation processes will be modified to accommodate the structural data changes inherent in the above-mentioned change to the Count/Non-Count designation of appointments. (Refer to section 3.6.2.3)

_____ The Clinic Specialty field is used for Consult Tracking Booking via MCP. Please consult with the clinical POC and/or DBA prior to making changes to this field.

_____ Only those appointment types that have the Medical Appt Type flag set to 'YES' in the Appointment Type file may be added to a schedule. If a user elects to create a schedule using a daily or weekly schedule that contains one or more nonstandard appointment types that do not have the Medical Appt type flag in the Appt Type Profile set to "YES", the system will display the following message to the user and prevent the user from creating a new schedule using that template as is: "This template may not be used to create schedules until the following appointment type/s is changed or the Medical Appt Type flag in the Appointment Type Profile is set to YES:

[Appointment Type]   [Appointment Type]"

B-4   FILE AND TABLE CHANGES

_____ The Database Administrator (DBA) should assign the new **SD APPT STAND** security key to PAS scheduling supervisors, creators of Templates, Schedules and booking clerks permitted to change Appointment Type, Duration, and with the ability to modify appointment slot Detail codes.

_____ The DBA should assign the new security key, **SD WK LOAD,** only to PAS personnel permitted to modify the Workload Type.

_____ Scheduling supervisors should note that conversions will:

- Set the Medical Appt Type flag to 'YES' in the Appointment Type file for the standardized appointment types. Nonstandard appointment types will be ignored by the conversion and will have this value set to null. In order to use them post-conversion, they will have to manually be changed post-install.

- Convert all provider templates linked to a clinic with a location type of C (Clinic) or S (Same Day Surgery). The conversion will populate the new Duration, Workload Type, and Detail Codes fields for each schedule slot in a Daily Template.

- Convert all provider schedules linked to a clinic with a location type of C (Clinic) or S (Same Day Surgery) and created for the previous month, the current month and all future dates. The conversion will populate the new Duration, Workload Type, and Detail Codes fields for each schedule slot in a provider schedule.

- Convert all scheduled and unscheduled Patient Appointment records with an appointment date from the 1st of the previous month, for the current month or a future date. This conversion will populate the new workload type field and detail codes field, if appropriate, in each Patient Appointment record. Unscheduled Visits will not have any detail codes linked to the patient appointment record after the conversion.

- Add two new fields, "Medical Appt Type" and "Uneditable:" to the Appointment Type Profile option (APRO). The standardized Appt Types will be set to YES.

- Convert all the entries in the PAS Templates file so that the new Duration, Workload Type and Appointment Detail Code fields linked to each schedule slot in a daily and weekly template are populated appropriately. (Refer to 3.3.2.4.) Appointment Detail Codes will be populated from the slot comment field for each scheduled slot.

- Convert the appropriate entries in the Schedulable Entity file so that the new Duration, Workload Type and Appointment Detail Code fields linked to each schedule slot in a schedule are populated appropriately. (Refer to 3.1.25). Appointment Detail Codes will be populated from the slot comment field for each scheduled slot.

- Convert the appropriate entries in the Patient Appointment file so that the new Workload Type and Appointment Detail Code fields linked to each scheduled appointment record are populated appropriately. (Refer to 3.1.25).

_____ Supervisors should be aware that if slot comments are not formatted and defined in Templates and Schedules as specified in section 3.1.2.5 B, Business rules for conversion, the comments will not convert. Schedule builders will then have to edit the templates and schedules to read the Detail codes.

_____ Scheduling supervisors should note that a new file for Detail Codes has been added (DFIL) and is contained in the PAS Scheduling Supervisor's menu under FILE->DFIL.

_____ The Scheduling Supervisor should ensure that all templates contain the Standard Appointment Types. However, all templates and schedules whether or not they contain

standard and non-standard appointment types, will be converted, including detail codes linked to each schedule slot being converted.

_____ Scheduling supervisors should note that individual Appointment Schedule Slots may be changed from Count to Non-Count by editing the Templates or Schedules and/or during the Booking process.

_____ Clinic supervisors should ensure that the new Clinic Profile field "Self-Referral Allowed" flag is set to "YES" if the clinic is one that allows self-referrals such as optometry, mental health, etc. If the clinic requires consults or referrals, then the field should be left null or set to "NO".

_____ Clinic supervisors should note that the Clinic Specialty field in the Clinic Profile (CPRO) has been relocated after the Clinic Profile parameters and will be a required field if the clinic "Self-Referral" flag is set to YES.

_____ Clinic supervisors having Clinic/Groups with Operational Forces enrolled patients should set the "Ops Forces PLOC" field to "YES" in order to permit booking to any provider in the MCP Group in which the patient's PCM is a member. This field can only be accessed via the Managed Care File and Table option PLAC.

_____ Site definable Appointment Detail age codes and other approved but not yet released codes may be added to the Detail Code file via the new option DFIL. Please refer to the Commander's Guide to Access Success on the TRICARE Access Imperatives web page at http://www.tricare.osd.mil/tai for the policy on adding new non-standard Appointment Detail Codes.

Menu path to add Detail Codes: CA->PAS->Scheduling Supervisor->FILE->DFIL

_____ **DBA's, Supervisors and credentialing personnel should ensure:**

that all self-referral clinics have the Clinic Specialty field populated prior to usage, that the MCP Specialty file is properly populated, and that providers who will have appointments booked via Self-Referral booking have a valid specialty populated in the MCP Specialty Type file.

This page has been
left blank
intentionally.

****

APPENDIX C:

SECURITY KEYS V 4.6

****

This page has been
left blank
intentionally.

Appendix C - Security Keys V 4.6

Two new security keys have been added in the Appointment Standardization Phase II Project. Following are those keys and their functions.

SD APPT STAND PAS Scheduling Supervisors tasked to create and maintain medical clinic profiles, templates and schedules must have the new **SD APPT STAND** security key.

Key Functions:
- Permits a user to enter/edit Detail Codes linked to a specified clinic in the PAS module on CHCS while creating/modifying templates and schedules, or while booking. Note: Detail codes cannot be changed in option USV (Unscheduled Visits). Detail codes can be changed in option EOD (End of Day) or when booking the appointment to reflect the actual care scheduled and rendered.

- Permits a user to enter/edit new Appointment Types to the Appointment Type file using the Appointment Type Enter/Edit option and change the Appointment Type while booking.

- Permits a user to enter/edit Duration of appointments.
.

SD WK LOAD Key Function:

- Permits a supervisor to modify the Workload Type for Count/Non-Count appointment slots while editing or adding slots to a Template or schedule.

- Permits a Booking clerk assigned this key, to change the Workload Type for Appointment slots while booking or during End of Day processing.

This page has been
left blank
intentionally.

****

APPENDIX D:

SAMPLE REPORTS

****

This page has been
left blank
intentionally.

Appendix D - Sample Reports

Non-MTF Log Report

NMC PORTSMOUTH   04 Jul 2000@1423   Page 1
      Personal Data - Privacy Act of 1974 (PL 93-579)

                               Non MTF Appointment Log By Patient
                                From: 08 Sep 1999 To: 04 Jul 2000

Patient Name   Patient SSN FMP/Sponsor SSN   Current Enrollment Status
BLITON,JERALD   278-55-5025 20/278-55-5025   ENROLLED

Place of Care
   Provider
   Appointment Date/Time   Referral Number   **Appointment Detail Codes**

NON-MTF CLINIC

   TARPIN,DANIELE
   ----
   01 Feb 2000@1102   20000000074   **PE BPAD**
   01 Feb 2000@1111   20000000075   **SCH BPAD BPNPR**
   02 Feb 2000@1045   20000000078
   04 Feb 2000@1354   20000000079

SAIC D/SIDDOMS Doc.D2-APTS-5000
24 Oct 2001

Self-Referral Booking Report (New Report)

Personal Data - Privacy Act of 1974 (PL 93-579)
SELF-REFERRAL BOOKING
From: 01 Jul 2000 To: 31 Jul 2000

Division: PORTSMOUTH   Clinic: GENERAL MEDICINE
==

Appt Date/Time	Appt Type	Dur	Detail Code		Patient	FMP/SSN

Clinic Specialty: OCCUPATIONAL HEALTH
================================
 Provider: SLOAN,MARK

| 01 JUL 00 | 0700 | WELL | 30 | BPAD | HEAD | BLITON,JERALD | 20/442-46-4725 |
| 01 JUL 00 | 0730 | WELL | 30 | BPAD | HEAD | ANDERSON,FREDRICK | 20/430-18-3498 |

....

| 31 JUL 00 | 0800 | WELL | 30 | BPPR | HEAD | WARWICK,ANNE | 30/234-50-3285 |

....
 Provider Subtotal: 51

 Provider: POTTER,HARRY

| 05 JUL 00 | 0700 | WELL | 30 | BPAD | HEAD | BLITON,MARK | 20/342-20-8623 |
| 05 JUL 00 | 0730 | WELL | 30 | BPPR | HEAD | ANDERSON,MARIA | 30/430-18-3498 |

....

| 30 JUL 00 | 0800 | WELL | 30 | BPPR | HEAD | LUKE,ANNE | 30/004-50-5510 |

....
 Provider Subtotal: 37

Clinic Specialty Subtotal: 88

Clinic Specialty: PREVENTIVE MEDICINE
================================
 Provider: KILDARE,RICHARD

| 01 JUL 00 | 0700 | WELL | 30 | BPAD | TOBCES | BLITON,JERALD | 20/442-46-4725 |
| 01 JUL 00 | 0730 | WELL | 30 | BPAD | TOBCES | ANDERSON,FREDRICK | 20/430-18-3498 |

....

| 31 JUL 00 | 0800 | WELL | 30 | BPPR | TOBCES | WARWICK,ANNE | 30/234-50-3285 |

....
 Provider Subtotal: 51

Provider: WELLBY,MARCUS

| 05 JUL 00 | 0700 | WELL | 30 | BPAD | TOBCES | BLITON,MARK | 20/342-20-8623 |
| 05 JUL 00 | 0730 | WELL | 30 | BPPR | TOBCES | ANDERSON,MARIA | 30/430-18-3498 |

....

| 30 JUL 00 | 0800 | WELL | 30 | BPPR | HEAD | LUKE,ANNE | 30/004-50-5510 |

....
 Provider Subtotal: 37

Clinic Specialty Subtotal: 88

        Clinic Total: 384
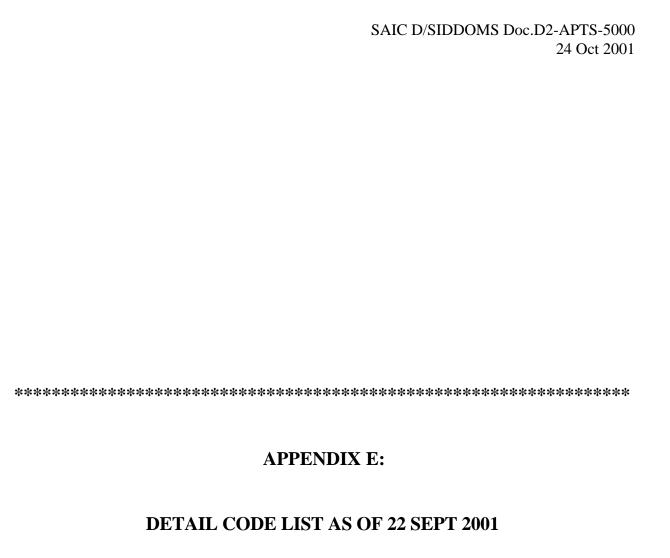   Division Total: 1027

Appointment Detail Code Schedule Utilization Report (New Report)

NMC PORTSMOUTH VA   07 Aug 2000@1041   Page 1

APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT
From: 01 Jul 2000 To: 15 Jul 2000

Division: PORTHSMOUTH   Clinic: PRIMARY CARE

| Appt Type/ Detail Code | # Slots Created | # Slots Modified | # Appts Modified | l#Fac lCanc | Appointments Available to Patients | | | | | % Booked | % Unbooked |
					# Booked Appts	Frozen	Open	Waited	Total		
Provider: ANDERSON,MATTHEW											
PCM											
[No Detail Codes]	50	20	0	0	30	0	0	0	0	100.00	0.00
PE BPAD	50	0	0	0	25	0	25	0	0	50.00	50.00
PE BPPR	20	0	0	0	20	0	0	0	0	100.00	0.00
ANGER	10	0	0	10	0	0	0	0	0	0.00	0.00
Subtotal:	120	20	0	10	75	0	25	0	0	75.00	25.00
WELL											
ANGER	50	20	0	0	30	0	0	0	0	100.00	0.00
ANGER BPAD	50	0	0	0	25	0	25	0	0	50.00	50.00
ANGER BPPR	20	0	0	0	20	0	0	0	0	100.00	0.00
Subtotal:	120	20	0	0	75	0	25	0	0	75.00	25.00
Provider Subtotal:	240	40	0	0	150	0	50	0	0	75.00	50.00
Clinic Subtotal: :	240	40	0	0	150	0	50	0	0	75.00	50.00

This page has been
left blank
intentionally.

****

APPENDIX E:

DETAIL CODE LIST AS OF 22 SEPT 2001

****

This page has been
left blank
intentionally.

```
APPOINTMENT DETAIL CODES LIST              22 Sep 2001@1202
CODE        DESCRIPTION
-----------------------------------------------------------------------

1TT         FIRST TRIMESTER
2TT         SECOND TRIMESTER
3TT         THIRD TRIMESTER
ACG         AFTER CARE GROUP
AD          ALCOHOL AND DRUG
ADEI        ALCOHOL AND DRUG EARLY INTERVENTION
ADHD        ATTENTION DEFICIT AND HYPERACTIVITY DISORDER OR ATTENTION DEFICIT
ADSC        ALCOHOL AND DRUG SCREENING ONLY
ADTX        ALCOHOL AND DRUG TREATMENT 2 WEEK PROGRAM ONLY
ANGER       ANGER MANAGEMENT EDUCATION
ANPST       ANERGY PANEL (STICK)
ANRD        ANERGY PANEL READING
AQUA        AQUA POOL
ASTHMA      ASTHMA EVALUATION OR EDUCATION APPOINTMENTS
ASTIG       TREATMENT OF ASTIGMATISM
AUENT       AUDIOMETRIC DIAGNOSTIC
BCP         BIRTH CONTROL
BEESN       BEE STING
BEPC        BIRTH AND EARLY PARENTING CLASS
BF>         WEIGHT EXCEEDING BODY FAT STANDARDS
BFC         BREAST FEEDING CLASS
BIO         BIOPSY
BK          BACK PAIN OR PROBLEM
BOTOX       BOTULINUM TOXIN TYPE A INJECTIONS
BPAD        ACTIVE DUTY ONLY
BPAP        ACTIVE DUTY AND PRIME ENROLLEES
BPAPS       ACTIVE DUTY, PRIME ENROLLEES, AND SPECIAL PROGRAMS PATIENTS
BPGME       GRADUATE MEDICAL EDUCATION
BPNAD       NO ACTIVE DUTY
BPNAP       TRICARE STANDARD, SPACE AVAILABLE, AND OTHER PATIENTS - NO AD OR P
BPNPR       NO PRIME ENROLLEES
BPPR        PRIME ENROLLEES ONLY, NO ACTIVE DUTY
BPSP        SPECIAL PROGRAMS PATIENT
BPTS        TRICARE STANDARD PATIENT ONLY
BRON        BRONCHOSCOPY
BTL         BILATERAL TUBAL LIGATION
CATH        CATHETER
CAVH        24 HOUR DIALYSIS TREATMENT
CCEP        COMPREHENSIVE CLINICAL EVALUATION PROGRAM FOR PERSIAN GULF ILLNESS
CHOL        CHOLESTEROL
CIRC        CIRCUMCISION
CLEFT       CLEFT LIP AND PALATE
CMDPSY      COMMAND DIRECTED PSYCHOLOGICAL EVALUATIONS
CNM         CERTIFIED NURSE MIDWIFE
COB         COMPLICATED OB PATIENT ONLY
COLON       COLONOSCOPY
COLPO       COLPOSCOPY, ABNORMAL PAP REQUIRED
CORSCR      CORNEA SCRAPE/RESCRAPE
```

COSMETIC	REFERRALS FOR NON-COVERED COSMETIC PROCEDURES
COUNS	COUNSELING ONLY
CPAP	CONTINUOUS POSITIVE AIRWAY PRESSURE
CYSTO	CYSTOSCOPY
DEXA	DEXA BONE SCAN
DIL	DILATION
DM	DIABETES
DOSIM	METHOCHOLINE & CPEX
DSGCH	DRESSING/BANDAGE CHANGE
DVIOL	DOMESTIC VIOLENCE CLASS
DXE	DOBUTAMINE STRESS TEST
E&I	FEMALE ENDOCRINE AND INFERTILITY PATIENT ONLY
EAR	EAR RECHECK
ECG	ELECTROCARDIOGRAM
ECHO	ECHOCARDIOGRAM
EDU	EDUCATION OR CLASS
EEG	ELECTROENCEPHALOGRAPHY
EFMP	EXCEPTIONAL FAMILY MEMBER PROGRAM
EGD	SCOPE OF ESOPHAGUS AND LOWER STOMACH
EMGM	NERVE CONDUCTION STUDIES
ENG	ELECTRONYSTAGMOGRAPHY TESTING
EP	AUDITORY BRAINSTEM, VISUAL, UPPER/LOWER SOMATOSENSORY EVOKED POTEN
ERCP	ENDOSCOPIC RETROGRADE CHOLANGIOPANCREATOGRAPHY
EVAL	EVALUATION - IN DEPTH
EXERC	EXERCISE THERAPY
EYEDZ	EYE DISEASE
EYEEX	EYE EXAM
FAM	FAMILY THERAPY OR MEETING
FCC	CHILD CARE PROVIDER MENTAL HEALTH SCREENING
FE	FEMALE PATIENT ONLY
FLAP	FLAPLIFT
FLEXS	ESOPHOGASTODUODENOSCOPY/FLEXIBLE SIGMOIDOSCOPY
FLT	FLIGHT PHYSICAL EXAM
FNA	FINE NEEDLE ASPIRATION
FOOT	FOOT OR ANKLE EVALUATION
GAST	GASTRIC BYPASS SURGERY PSYCHOLOGICAL EVALUATION
GDB	GESTATIONAL DIABETES PATIENT
GENE	GENETICS CONSULT
GYN	GYNECOLOGY APPOINTMENTS ONLY
HAE	HEARING AID EVALUATION
HAND	HAND PATIENT ONLY
HBT	HYDROGEN BREATH TEST
HC	HOUSE CALLS
HCATH	CARDIAC CATHERIZATION
HCDC	HEARING CONSERVATION PATIENT
HEAD	HEADACHE EDUCATION
HOLT	HOLTER MONITOR
HSG	HYSTEROSALPINGOGRAM
HTN	HYPERTENSION PATIENT
IDC	INDEPENDENT DUTY CORPSMAN
IMDEF	IMMUNODEFICIENCY
INJECT	SHOT ONLY
INS	INSERTIONS
ISOK	ISOLINETIC TESTING

```
IUD        PLACEMENT OF IUD
IVP        INTRAVENOUS PYELOGRAM
KNEE       KNEE SCHOOL FOR PATIENT WITH KNEE PAIN
LASER      LASER
LASEYE     LASER EYE SURGERY
LASIK      LASER-IN-SITUKERATOMILEUSIS
LBX        LIVER BIOPSY
LES        LEISHMANIASIS TREATMENT
LIFE       LIFE SKILLS GROUP
LP         LUMBAR PUNCTURE
MA         MALE PATIENT ONLY
MANO       MANOMETRY
MANO/PH    MANOMETRY/24 HR PH STUDY
MC         MEDICARE ELIGIBLE
MEB        EVALUATION BOARD PHYSICAL EXAM
MEDEX      LUMBAR EXTENSION MACHINE, SPORTS MEDICINE ONLY
MINOR      EXCISION OF SKIN TAGS, MOLES, WARTS, OR SUBCUTANEOUS NODULES
MOBEX      MOBILIZATION INTERVENTION & EXERCISE THERAPY, SPORTS MEDICINE ONLY
MOHS       MOHS SURGERY
NBO        NEWBORN PHYSICAL ONLY (3-7 DAYS AFTER DISCHARGE)
NECK       NECK PATIENT
NO         UNIVERSAL EXCLUSION - USED WITH OTHER DETAIL CODES, I.E., NO;THAL,
NOPAP      GYNECOLOGY APPOINTMENT ONLY, NO PAPS
NOR        Removal or possible replacement of Norplant
NP         NURSE PRACTITIONER
NPCL       NEW PRENATAL CLASS
NPSYC      NEUROPSYCHOLOGICAL TESTING ONLY - NO ADHD
NST        NON STRESS TEST (FETAL MONITORING DURING PREGNANCY)
NUTR       NUTRITION EDUCATION
OAE        NEWBORN HEARING SCREENING
OB         PREGNANCY OR OBSTETRICS
ONC        CANCER PATIENT OR TREATMENT ONLY
OSS        OVERSEAS SCREENING
PA         PHYSICIANS ASSISTANT
PACE       PACEMAKER
PAP        PAP SMEAR
PARA       ABDOMINAL PARACENTESIS
PARENT     PARENTING CLASS
PDS        PATHFINDING/DRILL SERGEANT TEST
PE         PHYSICAL EXAM
PEG        PERCUTANEOUS ENDOSCOPIC GASTROSTOMY
PFT        PULMONARY FUNCTION TEST/SPIROMETRY
PHA        PREVENTIVE HEALTH ASSESSMENT
PHOTO      PHOTOS
PLASMA     PLASMA
PNB        PROSTATE NEEDLE BIOPSY
POAE       PEDIATRIC OTOACOUSTIC EMISSION TEST
POP        POST OPERATIVE FOLLOW-UP
PP         POST-PARTUM PATIENT ONLY
PPD+       POSITIVE PURIFIED PROTEIN DERIVATIVE (PPD) OR OTHER TUBERCULOSIS T
PREOP      CHECK-IN FOR SURGERY / PRE-OPERATION ROUNDS
PRK        PHOTO REFRACTIVE KERATECTOMY
PRT        PHYSICAL READINESS TEST SCREENS
PULM       PULMONARY PATIENT ONLY
```

PVA	PSYCHOLOGICAL VOCATIONAL ASSESSMENT
PVR	POST-VOID RESIDUAL
REHAB	REHABILITATION THERAPY
RET	RETINAL SCREENING
RMV	REMOVALS
RPD	READINESS POST DEPLOYMENT
RPG	RETROGRADE PYELOGRAM
RPRE	READINESS PRE-DEPLOYMENT HEALTH
RUG	RETROGRADE URETHROGRAM
SCH	SCHOOL PHYSICAL
SCOLI	SCOLIOSIS
SCS	SKIN CANCER SCREENING
SEA	SEA DUTY SCREENING
SKT	SKIN TEST
SLEEP	SLEEP
SPD	SPECIAL DUTY EVALUATION
SPE	SEPARATION OR RETIREMENT PHYSICAL EXAM
SPRINT	SPRINT TEST
ST	EXERCISE STRESS TEST
STRESS	STRESS MANAGEMENT EDUCATION PROGRAM
TECH	PROVIDER IS A TECHNICIAN
TEE	TRANS-ESOPHAGEAL ECHOCARDIOGRAM
TELMED	TELE-MEDICINE CONFERENCE
THAL	THALLIUM STRESS TEST
TILT	TILT TEST, TEST FOR SYNCOPE
TOBCES	TOBACCO CESSATION
TRACTION	TRACTION PHYSICAL THERAPY
TRPLT	TRANSPLANT
TRUS	TRANSRECTAL ULTRASOUND
URODY	URODYNAMICS
UROGYN	UROGYNECOLOGY
US	ULTRASOUND
VAS	VASECTOMY
VERT	Vertigo
VF	VISUAL FIELD EXAM
VIP	VERY IMPORTANT PATIENT
VT	VENOM TEST
WB	WELL BABY
WCE	WORK CAPACITY EVALUATION
WEA	WEB AND MCP BOOKABLE
WEX	APPOINTMENT EXCLUDED FROM WEB APPOINTING
WOUND	WOUND CARE

****

APPENDIX F:

STANDARD APPOINTMENT TYPES

****

This page has been
left blank
intentionally.

```
STANDARD APPOINTMENT TYPE LIST           23 Sep 2001@2139     PAGE 1
NAME    DESCRIPTION
------------------------------------------------------------------------


PCM     INIT PRIMARY CARE APPT
PCM$    INIT PRIMARY CARE APPT; MTF
SPEC    INIT SPECIALTY CARE APPT
SPEC$   INIT SPECIALTY CARE APPT; MTF
ACUT    ACUTE APPT
ACUT$   ACUTE APPT; MTF
ROUT    ROUTINE APPT
ROUT$   ROUTINE APPT; MTF
WELL    WELLNESS/HEALTH APPT
WELL$   WELLNESS/HEALTH APPT; MTF
PROC    PROCEDURE APPT
PROC$   PROCEDURE APPT; MTF
EST     ESTABLISHED FOLLOW-UP
EST$    ESTABLISHED FOLLOW-UP; MTF
T-CON   TELEPHONE CONSULT
TCON    TELEPHONE CONSULT
GRP     GROUP
GRP$    GROUP; MTF
APV     SAME DAY SURGERY
EROOM   EMERGENCY ROOM VISITS
TCON$   TELEPHONE CONSULT; MTF
N-MTF   NON-MTF APPOINTMENT
```

This page has been
left blank
intentionally.